

2025 Privacy Policy Information



FACTS

WHAT DOES WHITE PINE INVESTMENT COMPANY (“WPIC”) DO WITH YOUR PERSONAL INFORMATION?

Why?

Maintaining the trust and confidence of our clients is a high priority. Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depend on the services we provide to you. In connection with providing financial advice, investment products, or other services, we obtain non-public personal information about you. This information can include:

- Social Security number or tax identification number, date of birth, address and phone number(s)
- Net worth, cash flow, income, account balances, tax returns
- Transaction history and information we receive from you on account applications

How?

Financial companies typically need to share customers’ personal information internally in order to run their everyday business – to process transactions, maintain or service customer accounts. Only those individuals who need to perform their jobs are authorized to have access to confidential client information. We maintain physical, electronic, and procedural security measures that comply with applicable state and federal regulations to safeguard confidential client information. In the section below, we list the reasons many financial companies can share their customers’ personal information; the reasons WPIC chooses to share your information; and whether you can limit this sharing.

Reasons we can share your personal information	Does WPIC share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
For our marketing purposes— to offer our products and services to you	NO	N/A
For our nonaffiliates’ everyday business purposes	YES	NO
For our nonaffiliates’ to market to you	NO	N/A

With permission, WPIC discloses limited information to attorneys, accountants, and mortgage lenders with whom Clients have established a relationship. Clients may opt out from WPIC sharing information with these nonaffiliated third parties by notifying WPIC at any time by telephone, mail, email, or in person. With permission, WPIC shares a limited amount of information about Clients with the Client’s brokerage firm to execute securities transactions on behalf of clients.

WPIC maintains a secure office to ensure that Client information is not placed at unreasonable risk. WPIC employs a firewall barrier and multi-factor authentication procedures in WPIC’s computer environment.

WPIC does not provide personal information to mailing list vendors or solicitors. WPIC requires strict confidentiality in agreements with unaffiliated third parties that require access to Client personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review WPIC records and Client personal records as permitted by law.

To limit our sharing or if you have Questions?

Call: (734) 464-2532
 Email: sporter@wpinv.com
 Visit us online: www.wpinv.com

Who we are

White Pine Investment Company (“WPIC”)

Privacy Policy (continued)

What we do

How does WPIC protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
We also restrict access to non-public personal information about you to those employees who have a need to know such information.

How does WPIC collect my personal information?

We collect your personal information, for example, when you:

- Open an account or provide account information
- Apply for a loan or make deposits or withdrawals from your account
- Seek advice about your investments

Why can't I limit all sharing?

Federal law gives you the right to limit only:

- Sharing for affiliates' everyday business purposes—information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you
- State laws and individual companies may give you additional rights to limit sharing.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account—unless you tell us otherwise.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *WPIC does not have any affiliated companies or entities*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *WPIC does not share with nonaffiliates so they can market to you.*

Joint Marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *WPIC does not engage in any joint marketing initiatives.*

Other important information

How often does WPIC notify me about their practices? We must notify you about our sharing practices when you engage our services and each year while you are a customer.

Changes to the Privacy Policy. If we make any substantial changes in the way we use or disseminate confidential information, we will notify you.