Welcome to Sage Income Advisors, LLC:

As Certified Financial Planners® we are fiduciaries, with a commitment to providing clients with the attention, confidentiality and personalized service that they deserve.

Our clients' best interests are our primary concern. We are dedicated to enhancing the financial health and success of our clients and placing their financial interests ahead of our own. As fee-only planners, we do not accept commissions, outside fee arrangements or third party compensation.

Privacy Notice:

Our Commitment to Your Privacy:
Protecting our clients' privacy is of paramount importance to Sage Investment Advisors. No private client financial information obtained by us is sold or made available to third parties except that:

- Third parties may be used by Advisor to assist in the management or maintenance of client accounts (such as a client's custodian);

- Client information may be released in accordance with applicable laws and regulations.

We will not share personal information about our clients with nonaffiliated third parties without prior client consent, except for specific purposes described below. This notice explains our collection, use and safeguarding of client information.

How We Gather Information:
In connection with providing clients with investment management services, we may obtain information about them from the following sources:

- Client agreements and other information that clients provide to us, whether in writing, in person, by telephone, electronically or by any other means. This information may include a client's name, address, phone number, email address, social security number, employment information, income, investment experience, and credit references;

- Personal tax returns provided by the client;

- Transactions on a client's behalf. This information may include the client's account balances, positions, investment interests and history; and

- Public sources.

Sharing Information with Nonaffiliated Third Parties:
We may disclose client information to third parties without prior client consent when we believe this necessary for conduct of our business, as it relates to client service or as required by law, such as:

- If you request or authorize the disclosure of the information;

- To provide client account services or account maintenance;

- To respond to a subpoena or court order, judicial process, law enforcement or regulatory authorities;

- To perform services for the firm or on its behalf to develop or maintain proprietary trading or other software;

- In connection with a proposed or actual sale, merger, or transfer of all or a portion of our business or an operating unit; and

- To help us prevent fraud.

We do not make any disclosure of client nonpublic personal information to other companies who may want to sell their products or services to you. For example, we do not sell client lists and we will not sell client names to catalogue companies.

Opt Out Provision:
If, at any time in the future, it is necessary to disclose any of client personal information in a way that is inconsistent with this policy, we will give our clients advance notice of the proposed disclosure so that they will have the opportunity to opt out of such disclosure.

Former Clients:
Our Privacy Policy continues to apply to all former clients.

To Whom This Policy Applies:
This Privacy Policy applies to individuals who obtain or have obtained services from Sage Investment Advisory Services and is used primarily for personal, family or household purposes.

Our Security Practices and Information Accuracy:
We take steps to safeguard client information. We restrict access to the personal and account information of our clients to our employees and agents for business purposes only. We maintain physical, electronic and procedural safeguards to guard your personal information.

Additionally, we have internal controls to keep client information as accurate and complete as we can. If you believe that any information about you is not accurate, please let us know.

Other Information:
We reserve the right to change this Statement of Privacy Policy. The examples contained within this Privacy Policy are illustrations and they are not intended to be exclusive. If you have any questions about our Privacy Policy, please contact Sage Income Advisors, LLC

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