Privacy Policy

Effective: March 19, 2026

Our Commitment to You
Concurrent Investment Advisors, LLC (“Concurrent” or the “Advisor”) is committed to safeguarding the use of personal information of our Clients (also referred to as “you” and “your”) that we obtain as your Investment Advisor, as described here in our Privacy Policy (“Policy”).

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we do everything that we can to maintain that trust. Concurrent (also referred to as "we", "our" and "us”) protects the security and confidentiality of the personal information we have and implements controls to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you.

Concurrent does not sell your non-public personal information to anyone. Nor do we provide such information to others except for discrete and reasonable business purposes in connection with the servicing and management of our relationship with you, as discussed below.

Details of our approach to privacy and how your personal non-public information is collected and used are set forth in this Policy.

Why you need to know?
Registered Investment Advisors (“RIAs”) must share some of your personal information in the course of servicing your account. Federal and State laws give you the right to limit some of this sharing and require RIAs to disclose how we collect, share, and protect your personal information.

What information do we collect from you?

Driver’s license number	Date of birth
Social security or taxpayer identification number	Assets and liabilities
Name, address and phone number[s]	Income and expenses
E-mail address[es]	Investment activity
Account information (including other institutions)	Investment experience and goals

What Information do we collect from other sources?

Custody, brokerage and advisory agreements	Account applications and forms
Other advisory agreements and legal documents	Investment questionnaires and suitability documents
Transactional information with us or others	Other information needed to service account

How do we protect your information?
To safeguard your personal information from unauthorized access and use, we maintain physical, procedural, and electronic security measures. These include such safeguards as secure passwords, encrypted file storage, and a secure office environment. Our technology vendors provide security and access control over personal information and have policies over the transmission of data. Our associates are trained on their responsibilities to protect Client’s personal information.

We require third parties that assist in providing our services to you to protect the personal information they receive from us.

How do we share your information?
An RIA shares Client personal information to effectively implement its services. In the section below, we list some reasons we may share your personal information. If you are a new client, we may begin sharing your information on the day you sign our agreement. When you are no longer our client, we continue to share your information as described in this notice.

Basis For Sharing	Do we share?	Can you limit?
Servicing our Clients We share non-public personal information with non-affiliated third parties (such as administrators, brokers, custodians, regulators, credit agencies, other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including but not limited to: processing transactions; general account maintenance; responding to regulators or legal investigations; and credit reporting. We share client information with Purshe Kaplan Sterling Investments, Inc. ("PKS") due to the oversight PKS has over certain Supervised Persons of the Advisor. You may contact us at any time for a copy of the PKS Privacy Policy.	Yes	No
Affiliates We share non-public personal information for our affiliates everyday business purposes, including information about your transactions and experiences.	Yes	No
Marketing Purposes Concurrent does not disclose, and does not intend to disclose, personal information with non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where Concurrent or the client has a formal agreement with the financial institution. Text messaging originator opt-in data will not be shared with third-parties for marketing purposes. **We will only share information for purposes of servicing your accounts, not for marketing purposes.**	No	Not Shared
Authorized Users Your non-public personal information may be disclosed to you and persons that we believe to be your authorized agent(s) or representative(s).	Yes	Yes

Artificial Intelligence ("AI")
We may utilize AI tools internally to assist with certain business and operational functions such as notetaking, data analysis, investment research support, client communications, or administrative processes. These AI tools do not replace human oversight, and are reviewed for accuracy and compliance with regulatory standards. We conduct thorough due diligence upfront and ongoing assessments of our AI tools' privacy and cybersecurity protocols to ensure they meet standards of security and confidentiality. If you have any questions or concerns about our use of AI, please contact us.

Changes to our Privacy Policy
We will send you a copy of this Policy annually for as long as you maintain an ongoing relationship with us.

Periodically we may revise this Policy and will provide you with a revised Policy if the changes materially alter the previous Privacy Policy.

Any Questions?
You may ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting us at (813) 709-8800.

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