

# Concurrent Investment Advisors, LLC

DBA: The Hamilton Group  
Communication Disclosures

## Disclosure:

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These Terms were last updated on November 21, 2022.

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**Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy will be profitable.**

Asset allocation may be used in an effort to manage risk and enhance returns. It does not, however, guarantee a profit or protect against loss. Performance of the asset allocation strategies depends on the underlying investments.

This Website is intended to provide general information about The Hamilton Group and its services. It is

not intended to offer or deliver investment advice in any way. Information regarding investment services are provided solely to gain an understanding of our investment philosophy, our strategies and to be able to contact us for further information.

Market data, articles and other content on this Website are based on generally available information and are believed to be reliable. Neither The Hamilton Group nor Concurrent guarantees the accuracy of the information contained in this Website. The information is of a general nature and should not be construed as investment advice.

Please remember that it remains your responsibility to advise The Hamilton Group or Concurrent, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

The Hamilton Group or Concurrent will provide all prospective clients with a copy of the current Concurrent Form ADV Part 2A ("Disclosure Brochure"), Form ADV Part 2B ("Brochure Supplement[s]") for The Hamilton Group, and Form ADV Part 3 ("Client Relationship Summary" or "Form CRS") for Concurrent. You may obtain a copy of these disclosures on the SEC Website at <http://adviserinfo.sec.gov> by searching for Concurrent by name or its IARD number (323135). To request a free copy of these disclosure documents via .pdf or hardcopy, please contact The Hamilton Group at [ap@hamiltongroupwealth.com](mailto:ap@hamiltongroupwealth.com). You may also contact Concurrent compliance at [compliance@poweredbyconcurrent.com](mailto:compliance@poweredbyconcurrent.com).

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#### Privacy Disclosures

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The Hamilton Group does not collect personal non-public information through this Website; however, The Hamilton Group and Concurrent may collect information from you on application forms, agreements, profile or investment policy statements, and other documents received or processed in relation to services we provide. We also may collect information from other sources.

We do not respond to "do not track" requests because we do not track you over time or across third party Websites to provide targeted advertising. We may track you across our Website to help us improve our content.

We may use "cookies" and similar online technologies to keep, and sometimes track, information about you regarding your usage of our Website. Cookies are small data files that are sent to your browser or related software from a Web server and stored on your device. Cookies help us to collect information

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When you are on this Website you may have the opportunity to click-through to other Websites, including Websites operated by unaffiliated third parties. These sites may collect nonpublic personal Information about you. We do not control sites operated by these entities and are not responsible for the information practices of these sites. This Privacy Policy does not address the information practices of other Websites. The privacy policies of Websites operated third parties are located on those sites.

For a copy of the Concurrent Privacy Policy, please click [HERE](#).

#### Email Disclosures

The Hamilton Group and Concurrent often communicate with its clients and prospective clients through electronic mail (“email”) and other electronic means. Your privacy and security are very important to us. The Hamilton Group and Concurrent make every effort to ensure that email communications do not contain sensitive information. We remind our clients and others not to send private information over email. If you have sensitive data to deliver to us, we can provide secure means for such delivery.

**Please note:** The Hamilton Group and Concurrent do not accept trading or money movement instructions via email.

As The Hamilton Group is working under a registered investment advisor, all emails may be subject to inspection by the Chief Compliance Officer (“CCO”) of Concurrent or the securities regulators.

If you have received an email from Concurrent in error, we ask that you contact the sender and destroy the email and its contents.

If you have any questions regarding our email policies, please contact the Concurrent Compliance Department at [compliance@poweredbyconcurrent.com](mailto:compliance@poweredbyconcurrent.com).

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