



tree town
INVESTMENTS

Privacy Policy

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1. WHY?

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.

2. WHAT TYPES OF PERSONAL INFORMATION DOES TREE TOWN INVESTMENTS COLLECT?

We collect information that you provide to us when you execute an investment advisory agreement or request that we prepare a financial plan on your behalf. The information we collect may include name, address, phone number, email address, social security number, and information about your interests, investments, and investment experience.

We collect information on our Web site through the use of "cookies". For example, we may identify the pages on our Web sites that your browser requests or visits. This information is only personally identifiable if you have voluntarily chosen to identify yourself; for example, by registering to receive our investment newsletters or other similar research.

Once you have an advisory relationship with us, to administer your account(s) and better serve you, we collect and maintain personal information about your transactions, including balances, positions, and history, and may include your name or other data in an internal client list that reflects your investment activities.

3. DOES TREE TOWN INVESTMENTS SELL YOUR PERSONAL INFORMATION?

No. We do not sell your personal information to anyone.

4. DOES TREE TOWN INVESTMENTS DISCLOSE PERSONAL INFORMATION TO ANYONE?

All financial companies need to share customers' personal information to run their everyday business. Tree Town Investments may disclose your personal information to companies that help us process or service your transactions and/or account(s), including companies that print and mail your physical account statements.

We may also disclose information, such as aggregate account and transaction data based on your personal information, to companies which assist us in marketing. We require these companies to refrain from using your personal information for their own use.

Tree Town Investments may be required to disclose or report your personal information by law, for example to cooperate with regulators or law enforcement agencies, to resolve consumer disputes, or for institutional risk control.



5. WHAT STEPS DOES TREE TOWN INVESTMENTS TAKE TO PROTECT YOUR PERSONAL INFORMATION?

Tree Town Investments takes the following steps to help protect its clients' personal information:

- We restrict access to personal information to our employees and agents for business purposes only. All employees are trained and required to safeguard such information.
- We maintain physical, electronic, and procedural safeguards to guard your personal information.
- Companies we hire to provide support services are not allowed to use your personal information for their own purposes and are contractually obligated to maintain strict confidentiality

6. 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 non-affiliates to market to you.

State laws and individual companies may give you additional rights to limit sharing.