

## Privacy Policy

### Protecting Your Privacy

Earning and keeping your trust have always been the guiding principles at the heart of Trust Point Inc. We vow to protect the personal and financial information that you have entrusted to us. Federal privacy regulations require us to share with you the policies and practices we follow to ensure that your information is safeguarded. We are more than happy to comply.

### Our Pledge To You

We consider it a great privilege to serve your financial needs, and we appreciate the confidence and trust you have placed in us. We pledge to:

- Respect the confidential nature of the information you provide us.
- Limit the collection and use of customer information to that which is necessary to service your accounts, administer our business, or inform you of all our products and services.
- Educate our employees to reinforce the importance of customer privacy.
- Maintain appropriate security standards, procedures and policies to protect your information.

### The Information We Collect

Trust Point collects nonpublic personal information about you from the following sources:

- Information we receive from you on our application or other forms.
- Information about your transactions with us.
- Information about your transactions with non-affiliated third parties.

### Keeping Information Safe

To ensure the security of your information, Trust Point will only use and share your personal information when needed to complete transactions on your behalf, to provide our services, to make you aware of services that we offer, and as otherwise required by law. Furthermore, we maintain sophisticated technology and security measures to protect your information. Our physical, electronic, and procedural safeguards meet or exceed federal requirements in all cases, and where we work with external service providers we require these service providers to treat your information with the same high degree of confidentiality that we do. In addition, our internal Code of Confidentiality is strictly enforced. Access to your personal and account information is restricted to those Trust Point employees whose job responsibilities require it in order to provide you with products and services.

### Ongoing Commitment to Privacy

If you ever should decide to close your account(s) or become an inactive customer, Trust Point will continue to adhere to the privacy policies and practices described in this notice.

**Thank you for the opportunity to serve you!** A trusting relationship with you is very important to us. Please be assured that we will do our utmost to protect your information. If we can be of further service to you, please contact us at (800) 658-9474 or visit our website at [www.trustpointinc.com](http://www.trustpointinc.com).

### About Trust Point

For more than a century, Trust Point has provided a full range of financial and advisory services to individuals, families, businesses and charitable organizations.

Our philosophy is simple. We believe that in doing what is best for our clients, we will be doing what is best for Trust Point.



Trust & Estate Administration



Investments & Wealth Management



Retirement Plans



Foundations & Non-Profits



Family Office