PRIVACY POLICY

Protecting your privacy is important to Legacy Trust Family Wealth Offices and our employees. We want you to understand what information we collect and how we use it. In order to provide our clients with a broad range of financial services as effectively and conveniently as possible, we use technology to manage and maintain client information. The following policy serves as a standard for all Legacy Trust Family Wealth Offices employees for collection, use, retention, and security of nonpublic personal information.

What Information We Collect

In the process of serving you, we may collect "nonpublic personal information" about you from the following sources:

- Information we receive from you on financial planning, estate planning, and retirement planning questionnaires
- Information about your transactions with us or others; and
- Information we receive from third parties such as brokers, insurance agents, or other financial service providers.

"Nonpublic personal information" is nonpublic information about you that we obtain in connection with providing a financial service to you. For example, nonpublic personal information includes information regarding your assets, estate plan, and beneficiary designations.

What Information We Disclose

We are permitted under law to disclose nonpublic personal information about you to third parties in certain circumstances. For example, as a manager of managers, we may disclose nonpublic personal information about you to portfolio managers selected to advise us on your account. Such disclosure would be to ensure that the manager fully understands the scope and objective of your account. We take steps to ensure that any such information disclosed to a manager is kept confidential. In addition, we may have to disclose information to government entities in response to subpoenas. We do not disclose any nonpublic information about you to anyone, except as permitted by law. If you decide to close your accounts(s) or become an inactive client, we will continue to adhere to the privacy policies and practices described in this notice.

Our Security Procedures

We take significant steps to safeguard client information. We restrict access to your personal and account information to those employees who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

Legacy Trust Family Wealth Offices consider privacy a fundamental right of clients and takes seriously the obligation to safeguard client information. For questions regarding this policy, please contact your Relationship Manager.

Actions You Can Take

You have the right to request that your nonpublic personal information not be shared with non-affiliated third parties. In addition, you can choose not to receive marketing offers from us by direct mail, telephone, and/or e-mail. This preference applies to offers from us about our services and about other outsourced services that we think may be of interest to you.

You can tell us your preferences by calling (904) 280-9100 between the hours of 8:30 a.m. and 5:00 p.m or by speaking with your Relationship Manager.