

Privacy Notice

FACTS	WHAT DOES PREFERRED LEGACY TRUST COMPANY DO WITH YOUR PERSONAL INFORMATION?
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.
WHAT?	<p>The types of personal information we collect and share depend on the products or services you have with us.</p> <p>This information can include:</p> <ul style="list-style-type: none"> • Social Security number and account transactions • Account balance and transaction history • Assets and investment experience <p>When you are no longer our client, we continue to share your information as described in this notice.</p>
HOW?	All financial companies need to share their client's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons Preferred Legacy Trust Company chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Preferred Legacy Trust Company share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
For our marketing purposes – to offer our products and services to you	YES	NO
For joint marketing with other financial companies	YES	NO
For our affiliates' everyday business purposes – Information about your transactions and experiences	YES	NO
For our affiliates' everyday business purposes – Information about your creditworthiness	NO	We don't share
For non-affiliates to market you	NO	We don't share

Questions?	Visit Preferred Legacy Trust Company at www.preferredlegacy.com
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Who we are	
Who is providing this notice?	Preferred Legacy Trust Company
What we do	
How does Preferred Legacy Trust Company protect my personal information?	We maintain physical, logical and procedural safeguards that comply with federal law to guard your personal information.
How does Preferred Legacy Trust Company collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Open an account • Make deposits or withdrawals from your account • Provide account information or give us your contact information • Direct us to buy or sell securities <p>We also collect your personal information from others, such as credit bureaus, affiliates or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market you • Sharing for non-affiliates to market you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Preferred Legacy Trust Company may share with affiliates.
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Preferred Legacy Trust Company does not share with non-affiliates so they can market to you.
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. Preferred Legacy Trust Company does not jointly market with non-affiliated financial companies.