

Privacy Notice for Clients

Effective Date: June 1, 2024
Your Privacy Is Important to Us

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?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- Account balances and payment history
- Credit history and credit scores

When you are no longer our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share clients’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients’ personal information; the reasons we choose to share; and whether you can limit this sharing.

Reasons we can share your personal information	Do we 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	No	We don't share
For our affiliates’ everyday business purposes – information about your transactions and experiences	No	We don't share
For our affiliates’ everyday business purposes – information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

Questions?

Call (000) 123-4567 or visit our website at www.examplecompany.com

Who We Are

Who is providing this notice?

Example Company and its affiliates identified on your account statements.

What We Do

- **How do we protect your personal information?**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

- **How do we collect your personal information?**

We collect your personal information, for example, when you:

- Open an account or apply for a loan
- Provide account information or give us your contact details
- Make deposits or withdrawals from your account

- **Why can't you 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 nonaffiliates to market to you

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

Definitions

- **Affiliates**

Companies related by common ownership or control. They can be financial and non-financial companies.

- **Nonaffiliates**

Companies not related by common ownership or control. They can be financial and non-financial companies.

- **Joint marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Important Notes about This Document

- This form is provided to comply with federal privacy regulations and informs clients how their personal information is collected, used, and shared.
- Clients should review this document annually and whenever it is updated.
- Limitation of data sharing as described is governed by federal and state laws; some rights to limit sharing may vary by state.
- This document does not need to be signed, but clients should retain a copy for their records.
- For questions or concerns about privacy practices, clients should contact the company directly using the details provided above.