

FACTS

WHAT DOES ASCENSUS TRUST COMPANY DO WITH YOUR PERSONAL INFORMATION?



Why?

Financial companies choose how they share your personal information. Privacy laws give individuals the right to limit some but not all sharing. Privacy laws also require us to tell you how Ascensus Trust Company collects, shares, and protects 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, name, date of birth, address, email, and account balances
- account transactions and transaction history
- retirement assets and wire transfer instructions

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

How?

Financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Ascensus Trust Company chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Ascensus 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 affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our marketing purposes— to offer our products and services to you	No	We don't share
For joint marketing with other financial companies	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

Who we are

Who is providing this notice?	Ascensus Trust Company
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What we do

How does Ascensus Trust Company protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with U.S. data privacy law. These measures include computer safeguards and secured files and buildings.
How does Ascensus Trust Company collect my personal information?	We collect your personal information, for example, when you ■ open an account or make deposits or withdrawals ■ provide account information or give us your contact information ■ provide your government-issued ID We also collect your personal information from our affiliates, or other companies.
Why can't I limit all sharing?	Applicable privacy 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 nonfinancial companies. ■ <i>Our affiliates include companies under the ownership of Ascensus.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■ <i>Ascensus Trust Company does not share with nonaffiliates so they can market to you.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ <i>Ascensus Trust Company does not jointly market.</i>

Questions?

Call 833-889-9878

For additional information about Ascensus' privacy practices, and to view our updates, please visit our privacy management page at www2.ascensus.com/privacy-management/