



PRIVACY NOTICE

FACTS	WHAT DOES PRIVATE WEALTH PARTNERS, LLC 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?	The types of personal information we collect and share depend on the service you have with us and may include “nonpublic, personal information” This information can include but not be limited to: <ul style="list-style-type: none"> • Social Security number, birth date, income, net worth and other assets, credit scores, addresses, phone numbers • Account balances, transaction history, risk tolerance and investment experience • Medical information (for insurance purposes)
How?	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons Private Wealth Partners, LLC chooses to share their customers’ personal information, and whether you can limit this sharing.

Reasons we can share your personal information:	Does Private Wealth Partners, LLC share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	Yes
For joint marketing with other financial companies	No	We do not share
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 do not share
For our affiliates to market to you	Potentially, Yes	Yes
For non-affiliates to market to you	No	We do not share
Comply with the request or requirements of regulatory and/or law enforcement organizations	Yes	No
Provide disclosure as otherwise permitted or required by law including responding to court orders and legal investigations	Yes	No

Opting Out	<p>You may request that we do not disclose your nonpublic, personal information for any reason other than the exceptions listed above under “Can you limit this sharing”.</p> <p>To request please call us at 415.461.3850. If we do not receive such a request from you within thirty days of you opening an account, contracting for services, or receiving our annual privacy notice, we reserve the right to assume you do not object to the disclosure of your information for any reason permitted by federal law until you notify us to the contrary. Please note that certain applicable state laws may impose additional restrictions upon the disclosure of customers’ confidential information.</p>
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Questions?	Call (415) 461-3850
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Who we are:	
Who is providing this notice?	Private Wealth Partners, LLC

What we do:	
How does Private Wealth Partners, LLC protect my personal information?	To protect your nonpublic personal information from unauthorized access and use, we use security measures that comply with federal law, industry practice and our own policies. These measures include physical, electronic and procedural safeguards.
How does Private Wealth Partners, LLC collect my personal information?	We collect your nonpublic personal information from you, for example, when you <ul style="list-style-type: none"> • open an account • make deposits or withdrawals from your account • tell us about your investment or retirement portfolio We also collect your personal information from others, such as credit bureaus, affiliates or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing. Private Wealth Partners will comply with applicable State Laws as it applies to each client's state of residence.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.
What happens if my account is inactive or if I decide to close my account?	We will continue to adhere to the privacy policies and practices as described in this notice.

Definitions:	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> • N/A
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies such as your custodian or broker dealer. <ul style="list-style-type: none"> • Private Wealth Partners does not share with non-affiliates so they can market to you.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> • Private Wealth Partners does not jointly market.
Other important information:	
n/a	