

## PRIVACY POLICY

### FACTS

#### WHAT DOES CYNOSURE PORTFOLIO ADVISORS 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 product or service you have with us. This information can include:

- Social Security number and income
- Account balances and transaction history
- Assets and investment experience
- Contact information and information collected through our website

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 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 Cynosure Portfolio Advisors LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Cynosure Portfolio Advisors share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We do not share
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	No
<b>For affiliates to market to you</b>	No	We do not share
<b>For nonaffiliates to market to you</b>	No	We do not share

#### Questions?

Call 801-521-3100 or go to [cynosureportfolioadvisors.com](http://cynosureportfolioadvisors.com)

Who we are	
Who is providing this notice?	Cynosure Portfolio Advisors LLC
What we do	
How does Cynosure Portfolio Advisors protect my 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 does Cynosure Portfolio Advisors collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>■ open an account or perform transactions</li> <li>■ make a wire transfer or tell us where to send money</li> <li>■ tell us about your investment portfolio</li> </ul> <p>We also collect your personal information from other companies.</p>
Website and Online Information	<p>We may collect limited information from website visitors through cookies and similar technologies. This information may include:</p> <ul style="list-style-type: none"> <li>■ IP Address, browser type, pages visited, and referring links</li> </ul> <p>This information is collected in an aggregated and anonymized manner to understand website usage and improve functionality. CPA may use third-party service providers, including Google Analytics, which receive aggregated and anonymized information and are not permitted to use it for their own marketing purposes.</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"> <li>■ sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>■ affiliates from using your information to market to you</li> <li>■ sharing for nonaffiliates to market to you</li> </ul> <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 non-financial companies.
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> <li>■ Cynosure does not share with nonaffiliates so they can market to you.</li> </ul>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together jointly market financial products or services to you.</p> <ul style="list-style-type: none"> <li>■ Cynosure does not share with nonaffiliates so they can market to you.</li> </ul>