

# WILLOW PARTNER ADVISORS,LLC. PRIVACY POLICY (“Willow” or “Trustwillow.com”)

Facts	WHAT DOES WILLOW 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 services you have with us. This information can include: <ul style="list-style-type: none"> <li>▪ Income</li> <li>▪ Assets and investment experience</li> <li>▪ Risk tolerance</li> </ul>
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 Willow shares information; and whether you can limit this sharing.

Reasons we can share your personal information	Does Willow share?	Can you limit this sharing?
<b>For our everyday business purposes-</b> such as to process and report your data, maintain your account(s), respond to court orders and legal investigations.	Yes	No
<b>For our marketing purposes –</b>	Yes	No

to offer our products and services to you.		
<b>For joint marketing with other financial companies</b>	No	We Don't Share
<b>For non-affiliates to market to you</b>	No	No

WHO WE ARE	
Who is providing this notice?	Willow Partner Advisors, LLC.
WHAT WE DO	
How does Willow 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. Other measures we employ include: (a) information access controls; (b) service provider oversight and confidentiality agreements; (c) proper disposal of customer information; and (d) periodic security training for personnel.
How does Willow collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> <li>▪ Open an account or seek advice about a financial advisor</li> <li>▪ Tell us about your investment or retirement portfolio.</li> </ul>

Why can't I 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 non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.

#### OTHER IMPORTANT INFORMATION

If your state offers greater protection than federal law, we will comply with the state law requirements. For example, if you are a customer or former customer and the mailing address for your account is in California, New Mexico, North Dakota, or Vermont, we will not disclose any nonpublic personal information about you to anyone, except as permitted by law, unless you authorize us to make those disclosures.