



## FACTS

### WHAT DOES ATLAS PRIVATE WEALTH MANAGEMENT DO WITH YOUR PERSONAL INFORMATION?

<b>Why?</b>	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.
<b>What?</b>	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>■ Social Security number and income</li> <li>■ Account balances and transaction history</li> <li>■ Investment experience and account transactions</li> </ul> <p>When you are <i>no longer</i> our customer, we continue to share your personal information as described in this notice.</p>
<b>How?</b>	All financial companies need to share their 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 Atlas chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Atlas 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, or report to credit bureaus	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 don't share
<b>For our affiliates' everyday business purposes —</b> information about your transactions and experiences	No	We don't share
<b>For our affiliates' everyday business purposes —</b> information about your creditworthiness	No	We don't share
<b>For non-affiliates to market to you</b>	No	We don't share

## Questions?

Call 800-432-7447 or go to [www.atlaspwm.com](http://www.atlaspwm.com)

## Who we are

### Who is providing this notice?

Atlas Private Wealth Management, LLC (“Atlas”)

## What we do

### How does Atlas 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 Atlas collect my personal information?

We collect your personal information, for example, when you

- Open an account or give us your income information
- Tell us about your portfolio or deposit money
- Enter into an investment management contract

We also collect your personal information from other companies.

### 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.

## Definitions

### Affiliates

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

- *Atlas does not share personal information with its affiliates.*

### Non-affiliates

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

- *Non-affiliates that we share with can include companies that aggregate data for reporting purposes.*

### Joint Marketing

A formal agreement between non-affiliated financial companies that together market financial products or services to you.

- *Atlas does not jointly market.*

## Other important information

- We are an affiliate of Focus Financial Partners, LLC, and we and other affiliates of Focus share certain of your personal information with an unaffiliated third party for the purpose of aggregating it and providing summary information based on this data to our parent company Focus.
- Our policy about obtaining and disclosing personal information may change from time to time. We will provide you notice of any material change to this policy before we implement the change.