

FACTS

WHAT DOES FIDUCIARY TRUST COMPANY 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 funds transfer instructions
- Account balances and transaction history
- Income and assets

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 Fiduciary Trust Company chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Fiduciary 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 marketing purposes— to offer our products and services to you	YES	NO
For joint marketing with other financial companies	NO	WE DON'T 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 DON'T SHARE
For our affiliates to market to you	NO	WE DON'T SHARE
For nonaffiliates to market to you	NO	WE DON'T SHARE

Questions?

Call 617.482.5270 or go to <https://www.fiduciary-trust.com/privacy/>

Who we are

Who is providing this notice?

FIDUCIARY TRUST COMPANY ("FTC")

What we do

How does **FTC** 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.

FTC also maintains electronic, physical, and procedural safeguards to protect this information.

How does **FTC** collect my personal information?

We collect your personal information, for example, when you

- Open an account or provide your contact information
- Seek investment advice or transfer assets into your account
- Make deposits or withdrawals in your account

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 nonaffiliates 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.

Definitions

Affiliates

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

- *Our holding company, Fiduciary Company, Inc., and our affiliate, Fiduciary Trust of New England.*

Nonaffiliates

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

- *FTC does not share with nonaffiliates so they can market to you.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *FTC does not jointly market with nonaffiliated financial companies.*

Other important information

For Massachusetts Residents: We have established standards and practices to comply with the provisions of M.G.L. c. 93H and 201 C.M.R. 17.00 in connection with the safeguarding of personal information for residents of the Commonwealth of Massachusetts.