



## PRIVACY NOTICE

At Greenleaf Trust, our clients' financial security is our mission and their privacy is our responsibility. We recognize that one of our most important assets is our clients' trust. While information is critical to providing quality service, the safekeeping of client information is a fundamental responsibility of Greenleaf Trust. We believe that privacy should not be compromised. We can ensure this privacy by adhering to the provisions of this notice.

### **Keeping Your Files Secure**

Greenleaf Trust takes steps to safeguard client information. The personal and financial information of our clients is available only to those identifiable employees who have a need to know that information. All employees are instructed, individually, on the importance of maintaining the confidentiality of this information and are required to maintain this confidentiality through our internal operating procedures.

We have in place security standards and procedures to aid in the prevention of unauthorized access to confidential information about our client accounts. In addition, we maintain physical, electronic, and procedural safeguards to protect your information.

### **Information We Collect About You**

We collect personal information about you to conduct our business, verify your identity, and comply with laws. The data we collect varies for different services and may include:

- your name, date of birth, address, phone number, Social Security Number, and driver's license or other approved photo identification (when necessary)
- your financial goals and preferences
- your assets, liabilities, insurance, savings, and investments
- information about the products and services we provide to you

The majority of this information is provided by you. With your permission, we may also obtain information from other professionals providing services to you.

### **With Whom We Share Data**

Greenleaf Trust does not disclose nonpublic personal information about you to any non-affiliated third party except as permitted by federal law. As such, we may disclose information to affiliated third parties that assist us in processing financial transactions or to cooperate with regulators. Our vendors are required to keep client data confidential and to use appropriate security measures to protect it.

The disclosure of specific information about client accounts or other financial information is made only when:

- the disclosure is at the client's request;
- we need to share your information to provide the service you have requested;
- directed by the trust document; or
- the disclosure is required or allowed by law (e.g., exchange of information with reputable reporting agencies, subpoena, investigation of fraudulent activity, regulatory exams, etc.).

Greenleaf Trust recognizes and respects the privacy expectations of our clients. We want our clients to understand our commitment to privacy, and as a result of our commitment, we developed this Privacy Notice. If you have any questions about this Privacy Notice or the privacy of your client information, please contact us at 269.388.9800, Toll Free: 800.416.4555, or [privacy@greenleaftrust.com](mailto:privacy@greenleaftrust.com).