



WHAT DOES GREATMARK INVESTMENT PARTNERS DO WITH YOUR PERSONAL INFORMATION?

Why?

Investment advisors and other 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 are based on the services we provide to you. This information can include:

- Social Security number and other personally identifiable information (PII)
- Investment account balances and information
- Assets (what you own) and liabilities (what you owe), and income/cash flow history
- Information such as titling and numbers for outside accounts, such as checking or savings accounts held away from your brokerage/custodian firm

How?

All financial companies need to share clients' personal information to run their everyday business and provide their services. In the section below, we list reasons that we share your personal information; and whether you can limit this sharing.

- We collect and use information that we believe will help us better serve you in our investment advisory role. We collect most of this information directly from you, in conversations or through written communication, and from the brokerage/custodian firm who holds your account assets. In certain circumstances, we may receive information concerning your financial situation from one of your other advisors, such as an accountant or attorney, if you have instructed them to share that information with us.
- We restrict access to your personal information to those within our firm who need to know in order to provide our services to you. Generally, every member of our firm is involved in providing you with those services. We have in place physical, electronic, and procedural safeguards in order to guard your personal information.
- We will share information about you with the brokerage/custodian firm that holds your assets only to the extent that it helps us and/or your custodian better serve you and administer your investment account.
- We will share information about you, such as account holdings and transactions, with certain technology providers and other third-party service providers that will help us better serve you and administer your investment account. Any such firms are required to protect the confidentiality and security of that information and may not reuse it for any other purpose.
- We will share information about your financial situation with one of your other advisors, such as your accountant, only if you instruct us to do so.
- We will share information about you to other outside parties only if we are required and permitted to do so by law or regulation.
- **We never share any of your personal information with any affiliates or non-affiliate third parties for marketing purposes to offer either our own services or the products or services of other companies.** You do not need to opt-out of this type of sharing.

We greatly value the trust that you have placed in us. While that trust guides us to safeguard the privacy and confidentiality of the information you provide us, it extends to every other facet of our relationship as well. You do not need to respond to this notice, but if you have any questions or comments concerning it, please contact us at (706) 327-2128 or toll-free (877) 327-2128.