



PRIVACY POLICY

We take the safeguarding of client information seriously at Marble Trail Advisors. Together with our affiliate Marble Trail Financial we provide clients a broad range of financial services. To deliver these services as effectively and conveniently as possible, it is essential that we use technology to manage and maintain certain information. To uphold our unwavering commitment to the proper use of client information, we have set forth the following Privacy Policy.

FACTS	WHAT DOES MARBLE TRAIL ADVISORS DO WITH YOUR PERSONAL INFORMATION?
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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 and don't do.
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What?	<p>The types of personal information we collect and may share depend on the financial services you receive from us. This information can include:</p> <ul style="list-style-type: none"> Social Security number and contact information; Account balances and transaction history; and Sources and amounts of income.
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How?	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' information, the reasons Marble Trail Advisors chooses to share, and whether you can limit this sharing.
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Reasons We Can Share Your Personal Information	Does MTA Share?	Can You Limit This Sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), and respond to court orders and legal investigations	Yes	No
For our marketing purposes – to offer our products and services to you	No	n/a
For joint marketing with other financial companies	No	n/a
For our affiliate's everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliate's to market to you	No	n/a
For nonaffiliates to market to you	No	n/a

Who Are We?	
Who is providing this notice?	Marble Trail Advisors and its affiliate Marble Trail Financial

What Do We Do?	
How does Marble Trail Advisors and its affiliate 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. Marble Trail Advisors also provides employees with continuous training on cybersecurity threats and routinely monitors for compliance with company policies.
How does Marble Trail Advisors and its affiliates collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • open an account • transfer money between accounts • work with us to prepare a financial plan • request other financial advice or services <p>We may also receive information from third parties with respect to your account such as trade confirmations and changes to contact information from brokerages.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • 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 <p>State laws and individual companies may give you additional rights to limit sharing.</p>

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Marble Trail Financial, a provider of tax and accounting services, is our sole "affiliate."
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Examples include custodians and various providers of technology solutions, including Envestnet/Tamarac and Morningstar/Redtail.

Questions?	Call 802-388-6300 or go to www.marbletrail.com
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