

Privacy Policy Information

F a c t s	What Does PrimeTRUST Advisors LLC (“PTA”) Do With Your Personal Information?
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Why?	We collect certain nonpublic information about you (“Customer Information”). The essential purpose for collecting Customer Information is to allow us to provide advisory services to you. Federal law requires us to tell you how we collect, share, and protect your information. Please read this notice carefully to understand what we do.
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What?	<p>The types of information we collect and share depend on the service that we provide to you. This information can include, but would not be limited to:</p> <ul style="list-style-type: none"> ▪ Information you provide on applications or other forms. This Customer Information may include: <ul style="list-style-type: none"> ○ For Institutional clients: The current market value of Retirement Plan’s investment holdings, the number of Plan participants and average account balances, the Plan’s Investment Policy. Etc. ○ For Individual clients: Personal and household information such as income, spending habits, investment objectives, financial goals, statements of account, and other records concerning your financial condition and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages and tax returns. ▪ This information may include nonpublic personal information such as your name, age, address, social security number, etc. ▪ Information about your transactions with us, or others (e.g., broker-dealers, clearing firms, or other chosen investment sponsors). ▪ Information we receive from other various materials we may use to provide an appropriate recommendation or to fill a service request.
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How?	Financial companies typically need to share their clients’ financial information internally in order to run their everyday business - to generate reports and to maintain or service client accounts. In the section below, we list the reasons many financial companies can share their clients’ financial information; the reasons PTA chooses to share your information; and whether you can limit this sharing.
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Reasons we can share your financial information	Does PTA share?	Can you limit this sharing?
For our everyday business purposes - To process your reports, monitor performance, and provide support for questions you may have.	Yes	No
For our internal marketing purposes - To offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	N/A - We don’t share
For non-affiliates to market to you	No	N/A - We don’t share
For our affiliates’ everyday business purposes	Not applicable	Yes
For our affiliates to market to you	Not applicable	Yes

Contact Us	Call (864) 552-4020 or email support@primetrustadvisors.com
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Facts

What Does PTA Do With Your Customer Information?

Sharing practices

How often does PTA notify me about their practices?	We must notify you about our sharing practices when you engage our services and each year while you are a client.
How does PTA protect this information?	To protect your information from unauthorized access and use, we restrict access to those employees who need to know that information to service your account. We use security measures that comply with applicable federal and state standards. These measures include computer safeguards and secured files and offices.
How does PTA collect this information?	We collect certain nonpublic information from you, for example, when you establish a working relationship with our firm and custodial reports from authorized service providers.
Why can't I limit all sharing?	Federal law gives you the right to limit sharing only for <ul style="list-style-type: none">▪ affiliates' everyday business purposes▪ affiliates to market to you; and▪ non-affiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.
How does PTA treat Customer Information of former clients?	The firm will provide nonpublic information about former clients only if required to do so by law or regulation or to those parties who need such information in order for the firm to carry out any continued obligation with respect to the services covered by the former adviser/customer relationship.

Definitions

Everyday business purposes	The actions necessary by financial services companies to run their businesses and manage client services by: <ul style="list-style-type: none">▪ generating reports, mailing, and auditing services;▪ providing information to support client inquiries; and/or▪ responding to regulatory audits and to court orders.
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none">▪ PTA does not have any affiliated relationships.
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none">▪ PTA does not share with non-affiliates so they can market to you.
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none">▪ PTA does not jointly market.

Changes

In the event there were to be a material change to our privacy policy regarding how we use your confidential information, we will provide written notice to you. Where applicable, you would be given an opportunity to limit or opt-out of such disclosure arrangements.