

FACTS	WHAT DOES BLUE TRUST, INC. DO WITH YOUR PERSONAL INFORMATION?	
Why?	Financial companies choose how they share your financial 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: <ul style="list-style-type: none"> ▪ Social Security number and assets ▪ Account balances and transaction history ▪ Risk tolerance and account information 	
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 Blue Trust chooses to share; and whether you can limit sharing.	
Reasons we can share your personal information	Does Blue Trust 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	Yes	Yes
For nonaffiliates to market to you	No	We don't share
To limit our sharing	<ul style="list-style-type: none"> ▪ Call 1-833-342-0984 — our menu will prompt you through your choices, or ▪ Visit us online: www.bluetrust.com/privacyoptout <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>	
Questions?	Call your Advisor or call our Compliance Department at 833-342-0984. Or visit us at bluetrust.com/privacy-regulatory	

Who we are	
Who is providing this notice?	Blue Trust, Inc.
What we do	
How does Blue Trust 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. For more information visit bluetrust.com/privacy-regulatory .
How does Blue Trust collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ open an account or show your government-issued ID ▪ give us your contact information or seek advice about your investments ▪ make deposits or withdrawals from your account <p>We also collect your personal information from other companies.</p>
Why can't I limit all sharing?	Federal law gives you the right to limit only <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. See below for more on your rights under state law.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Our affiliates include Movement Mortgage, LLC, Leap Insurance, LLC (d/b/a Movement Insurance), Movement Bank, Vident Advisory, LLC (d/b/a Vident Asset Management) and Sovereign's Capital Management, LLC.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Blue Trust does not share with nonaffiliates so they can market to you.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Blue Trust does not jointly market.</i>

Other important information
<p>Special Notice for California Residents</p> <p>If you are a California resident, the California Consumer Privacy Act (CCPA) may provide you with additional rights concerning Blue Trust's collection, use, and disclosure of your personal information. To learn more about your CCPA privacy rights, please visit bluetrust.com/California-Privacy-Policy. In addition, in accordance with California law, we will not share information we collect about you with nonaffiliated third parties, except as permitted by law; such as with your consent, to process your transactions or to maintain your account. We will automatically treat accounts with California mailing addresses as if they have limited sharing information with our affiliates.</p> <p>Special Notice for Vermont Residents</p> <p>In accordance with Vermont law, we will not share information we collect about you with nonaffiliated third parties, except as permitted by law; such as with your consent or to service your account. We may share information about your transactions or experiences with our affiliates without your consent. We will not disclose information about your creditworthiness to our affiliates and will not disclose your personal information, financial information, credit report, or health information to nonaffiliated third parties to market to you, other than as permitted by Vermont law, unless you authorize us to make those disclosures. Additional information concerning our privacy policies can be found at https://www.bluetrust.com/privacy-regulatory/ or call (833) 342-0984.</p>