



PRIO WEALTH LP

FACTS	What does Prio Wealth LP (“Prio”) do with your personal information?
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.
WHAT?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ■ Social Security number, date of birth and address ■ Assets, liabilities, income and expenses ■ Personal financial statements and tax returns <p>When you are no longer our customer, we continue to share your information as described in this notice.</p>
HOW?	All financial companies need to share a customer's personal information to run their everyday business. In the section below, we list reasons financial companies can share their customer's personal information; the reasons Prio chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Prio share?	Can you limit sharing?
For our everyday business purposes – such as 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 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	No	We don't share
For our affiliates everyday business purposes – information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

QUESTIONS?	Call 617-224-1900 or go to www.priowealth.com
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Who we are	
Who is providing this notice?	Prio Wealth LP

What we do	
How does Prio 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, secured files and buildings as well as monitoring the secure measures of our third-party vendors who support our business.
How does Prio collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Open an account or give us your personal information • Tell us about your investment or retirement portfolios • Enter into an investment advisory contract • Give us other personal information • Show your government-issued ID <p>We also collect your personal information from other institutions such as custodians, banks, attorneys, accountants and/or other advisors.</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	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • Prio may share nonpublic personal information with its subsidiary, Seaward Fiduciary Trust Services, as applicable
Non-affiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • Non-affiliates that we share with can include companies that aggregate data for administrative and reporting purposes.
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • Prio does not jointly market.

Other important information

Special Notice for California and Vermont Residents: Except for our everyday business purposes and/or our marketing purposes, we will not share your personal information without giving you additional privacy choices.