



CHAPIN DAVIS PRIVACY NOTICE

Chapin Davis is committed to protecting your privacy. To provide the services you expect from a financial service leader, we must collect personal information about you. We do not sell your personal information to third parties. This notice describes our current privacy practices. While your relationship with us continues, we will update and send our privacy notice as required by law.

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.

INFORMATION WE MAY COLLECT AND USE

We collect personal information about you to help us identify you as our customer to process new account opening, requests and transactions, financial planning, investment advice, risk tolerance and suitability; all requirements to offer investment management services, products and services. The type of personal information we collect may include:

- We collect and share various types of personal information dependent upon the product or service you have with Chapin Davis. This information may include: social security number, employment information, account balances, transaction history and investment experience.

All financial companies need to share customers' personal information to run their everyday business. In the following section, we list the reasons financial companies can share their customers' personal information; the reason we chose to share; and whether you can limit sharing.

Chapin Davis will share your personal information for the following reasons:

- Everyday business purposes such as processing your transactions, maintaining your account(s), responding to court orders and legal investigations, or report to credit bureaus. Customers may not limit sharing.

- Marketing purposes with service providers we use to offer our products and services to you. Customers may not limit sharing.
- We do not share information with other financial companies for joint marketing efforts.
- We share information with our business affiliates for everyday business purposes regarding your transaction history and experience. Customers may not limit sharing.
- We share information with our business affiliates to market to you. Customers have the right to limit sharing.

To limit sharing, please call Richard Briggs, CCO, at 1-410-435-3200 or email compliance@chapindavis.com

HOW WE PROTECT YOUR 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.

