



## PRIVACY POLICY

Thank you for reviewing our privacy commitment to you. Your privacy is important to us. Under federal law, you have a right to know what information is being collected about you and how that information will be used.

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on investment advisory agreements, investment policy statements, brokerage account applications and other forms.
- Information you provide to us verbally.
- Information received from third parties, such as brokerage firms.
- Information that has been forwarded to us by your other professional advisors.

We do not disclose any nonpublic personal financial information about you to anyone, except in the following circumstances:

- The information we collect may be provided to companies that perform services on our behalf as necessary to effect, administer, or process a transaction, or for maintaining and servicing your account.
- When you have specifically authorized and directed us to do so.
- When required by law.

Within Waycross, access to your personal financial information is restricted to the employees who need to know that information to provide services to you. To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect your privacy.

All personnel sign agreements prohibiting their sharing private information about clients with a third party unless instructed to do so by an officer of Waycross under one of the circumstances noted above. This agreement continues in place after employment terminates.

REVISED 3/8/2022