

Atlanta Consulting Group Advisors, LLC Privacy Notice

This is for your information only. No action is required on your part.

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.

Atlanta Consulting Group Advisors, LLC (“ACG”) is committed to maintaining the confidentiality, integrity, and security of the personal and financial information that our clients have entrusted to us. To that end, we are providing you with a copy of our current Privacy Notice to remind you of our concern for, and our efforts related to, the protection of your personal non-public information.

What information do we collect?

The types of personal information that we collect and share depend on the products or services you have with us. This information can include:

- Personal identification information, including names, physical addresses, email addresses, telephone or mobile numbers, and gender;
- Financial account numbers, social security numbers, passports numbers, driver’s license numbers, account numbers, account balances, and income tax information; and
- Representations made regarding assets and income, as well as representations of sources of wealth.

We collect this information when you provide it directly to us and where we believe it is reasonably required for ordinary business purposes. In some instances, we create personal information about you, such as records of your interactions with us and details of your accounts. We do not seek to collect or process sensitive personal information unless it is required or permitted by law; necessary for the detection or prevention of crime; necessary to establish, exercise or defend legal rights; or we have your prior explicit consent.

How do we collect your data?

You directly provide ACG with most of the information we collect. This occurs:

- When you become a client of ACG or one of our affiliates;
- For as long as you remain a client of ACG or one of our affiliates; and
- When you interact with our website, ACG-sponsored software application or web-based portal.

Our “affiliates” are companies with which we share common ownership. We do not currently have any affiliated companies. ACG may also receive information from financial institutions whereby you have granted us authority to inquire or act on your behalf.

How will we use your personal information?

We use and otherwise process the information we collect from you:

- To process your transactions and maintain your accounts;
- To administer, evaluate, and improve our business (including consideration of investment opportunities, performing data analytics and other research tasks, communicating with you via any means, performing accounting, auditing, and other internal functions);
- So that our affiliates and nonaffiliates can provide services to you;

- To market our products and services to you or otherwise provide you with relevant information;
- To help comply with relevant industry standards, contractual obligations, and our policies;
- To respond to court orders and legal investigations; and
- To facilitate account creation and the logon process, manage user accounts, protect our services, enforce our terms, conditions & policies, deliver and facilitate delivery of services, respond to user inquiries, and offer support to users through any ACG-sponsored software application or web-based portal.

How will we share your information?

We only share information with your consent, to comply with laws, to provide you with services, to protect your rights, or to fulfill business obligations. In addition, we may be required to share your information to comply with applicable law, governmental requests, a judicial or regulatory proceeding, court order, or legal process, such as in response to a court order or a subpoena. You cannot limit this sharing.

We do not share your information with nonaffiliates to market their products and services to you.

How long do we keep your information?

We will retain copies in a form that permits identification for as long as we deem necessary in connection with the purposes set out in this notice unless applicable law requires a longer retention period. We will retain personal information for as long as necessary to establish, exercise, or defend any legal rights.

How do we safeguard your information?

We take our responsibility to protect the privacy and confidentiality of your information, including personal information, very seriously. We maintain physical, electronic, and procedural safeguards that are intended comply with applicable legal standards to secure such information from unauthorized access and use, accidental or unlawful alteration and destruction, and other unlawful or unauthorized forms of processing. We have also implemented appropriate technical and organizational security measures designed to protect the security of any personal information we process.

We hold our employees accountable for complying with relevant policies, procedures, rules, and regulations concerning the privacy and confidentiality of your information.

We take reasonable steps to ensure that the personal information we process is limited to what we require in connection with the purposes set out in this notice; that the information is accurate and, where necessary, kept up to date; and the information is erased or rectified, without delay, if it is inaccurate. From time to time, we may ask you to confirm the accuracy of your personal information.

Even if you are no longer a client of ACG, we will adhere to the privacy policies and practices described in this notice.

How will you know if there are changes to our privacy policy and this Privacy Notice?

If there are any material changes, you will be notified through appropriate means.

What if you are protected by additional privacy legislation?

For US residents covered by state-specific consumer privacy legislation, along with certain European regions, such as the European Economic Areas (EEA) and the United Kingdom (UK), you have rights that allow you greater access to and control over your personal information. Please contact us at compliance@acgconsulting.com for additional details.

This Privacy Notice was updated on December 9, 2024. If you have questions or comments, please email us at compliance@acgconsulting.com or call us at (888) 317-2810.