

## FACTS

### WHAT DOES WALDRON PRIVATE WEALTH, LLC 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?

The types of personal information we collect and share depend on the product or service you have with us. This information can include: Social Security number and wire transfer instructions; assets and income; account balances and transaction history, contact information, investment objectives, written communications with us, records created in the course of providing advisory services, including notes, transcripts, summaries, and similar records generated or assisted by software tools we use in our business.

#### 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 Waldron Private Wealth, LLC ("Waldron") chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Waldron share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
<b>For our marketing purposes—</b> to offer our products and services to you	YES	NO
<b>For joint marketing with other financial companies</b>	NO	We don't share
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	NO	We don't share
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	NO	We don't share
<b>For our affiliates to market to you</b>	NO	We don't share
<b>For nonaffiliates to market to you</b>	NO	We don't share

#### To limit our sharing

- Call (412) 221-1005 or
- Visit us online: <https://www.waldronprivatewealth.com/>

**Please note:**

If you are a *new* 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; however, you can contact us at any time to limit our sharing.

#### Questions?

Call (412) 221-1005 or go to <https://www.waldronprivatewealth.com/>

## Who we are

Who is providing this notice?	Waldron Private Wealth, LLC, doing business as Waldron Private Wealth
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## What we do

### How does Waldron 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. We also use administrative, technical, and contractual controls designed for technology vendors and software tools, including access controls, data minimization, vendor due diligence, and other safeguards appropriate to the sensitivity of the information involved.

### How does Waldron collect my personal information?

We collect your personal information, for example, when you open an account or direct us to buy/sell your securities, pay your bills, provide account information or give us your contact information, make a wire transfer, communicate with us by email, phone, video conference, text, portal, or other channels, or use services and tools we make available to you. We also collect your personal information from other companies. In some cases, our service providers may help us process communications or records using software tools, including artificial intelligence-enabled tools, to support note-taking, transcription, summarization, data extraction, cybersecurity monitoring, operational support, research support, or other ordinary business functions.

### Why can't I limit all sharing?

Federal law gives you the right to limit only

- 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

State laws and individual companies may give you additional rights to limit sharing.

### 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.

- *Waldron does not share with affiliates so they can market to you.*

### Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Waldron does not share with nonaffiliates so they can market to you.*

### Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *Waldron does not jointly market*

## Other important information

For California Residents: Waldron will not share information we collect about you with nonaffiliated third parties, except as permitted by California law, such as to process your transaction or maintain your account.

To protect yourself, we strongly recommend that you do not provide your account information, user name or password to anyone. If you notice or become aware of any suspicious activity or transaction, it is your responsibility to notify us immediately.