

Logan Capital Management Privacy Policy

FACTS

WHAT DOES LOGAN CAPITAL MANAGEMENT, INC (“LOGAN”) 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 Income
- Account Balances and Transaction History
- Assets and Employment History

When you are *no longer* our customer, we continue to share your information as described in this notice.

HOW?

All financial companies need to share customer information to run their everyday business. In the section below, we list the reasons financial companies can share their customer’s personal information, the reasons LOGAN chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Logan share?	Can you limit this sharing?
For our everyday business purposes - such as to 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 with other financial companies	No	We don’t share without your permission
For joint marketing with other financial companies	No	No
For our affiliates’ everyday business information about your transactions and experiences.	Not Applicable	Not Applicable
For our affiliates’ everyday business purposes information about your creditworthiness.	Not Applicable	Not Applicable
For our affiliates’ to market to you	Not Applicable	Not Applicable
For our non-affiliates’ to market to you	No	We don’t share

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To Limit our sharing

- Call your Logan Capital representative at 1-800-569-1100
- Send an email to administrationsiteam@logancapital.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 1-800-569-1100 or go to www.logancapital.com

Who we are

Who is providing this notice?

- Logan Capital Management, Inc.

What we do

How does Logan 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.

How does Logan collect my personal information?

We collect your personal information, for example, when you:

- open an account
- seek advice about your investments
- provide employment information or show your drivers' license

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 non-affiliates to market to you
- State laws and individuals companies may give you additional rights to limit sharing

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Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial. <i>Not Applicable</i>
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. <i>Logan does not share with non-affiliates so they can market to you.</i>
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <i>Logan does not joint market</i>