



2018 Walnut Hill Advisors, LLC Privacy Notice to Our Clients

Walnut Hill Advisors, LLC (“WHA”) strongly believes in protecting the confidentiality and security of information we collect about you. This notice refers to WHA by using the terms “us,” “we,” or “our”. This notice describes our privacy policy and describes how we treat the information we receive (“Information”) about you.

Why We Collect and How We Use Information: We collect and use Information for business purposes with respect to our business relationships involving you. These business purposes include evaluating a request for services, administering our services, and processing transactions requested by you. We may also use Information to offer you other services we provide and to help us verify identities in order to prevent money laundering and terrorism.

How We Collect Information: We get most Information directly from you. The Information that you give us when applying for our services generally provides the Information we need. If we need to verify Information or need additional Information, we may obtain Information from third parties such as adult family members, employers or consumer reporting agencies. Information collected may relate to your finances, employment, avocations, or other personal characteristics as well as transactions with us or with others, including our affiliates.

How We Protect Information: We treat Information in a confidential manner. Our employees and representatives are required to protect the confidentiality of Information. Our employees and representatives may access Information only when there is an appropriate reason to do so, such as to administer or offer our services. We also maintain physical, electronic, and procedural safeguards to protect Information; these safeguards comply with all applicable laws. Employees and representatives are required to comply with our established policies.

Information Disclosure: We may disclose any Information when we believe it necessary for the conduct of our business, or where disclosure is required by law. For example, Information may be disclosed to others to enable them to provide business services for us such as, performing general administrative activities for us and assisting us in processing a transaction requested by you. Information may also be disclosed for audit or research purposes; or to law enforcement and regulatory agencies, for example, to help us prevent fraud. Information may be disclosed to affiliates as well as to others, such as companies that process data for us, companies that provide general administrative services for us, and consumer reporting agencies. We may make other disclosures of Information as permitted by law.

Information may also be shared with companies with which we have a client service relationship or joint marketing agreement, for example, an agreement with an insurance company to enable us to offer you certain products or services from that insurer; or another example, one of our subject matter experts in tax, law, Medicare, financial products, etc. We do not make any other disclosures of Information to other companies who may want to sell their products or services to you. For example, we will not sell your name to a catalogue company. We may disclose any Information, other than a consumer report or health information, for the purposes described in this paragraph.

Access to and Correction of Information: Generally, upon your written request, we will make available Information for your review. Information collected in connection with, or in anticipation of, any claim or legal proceeding will not be made available. If you notify us that the Information is incorrect, we will review it. If we agree, we will correct our records. If we do not agree, you may submit a short statement of dispute, which we will include in any future disclosure of Information.

How You Can Get Other Material from Us: In addition to any other privacy notice we may give you, you may have other rights under the law. If you want to know more about our privacy policy, please contact us at Walnut Hill Advisors, LLC, 90 Concord Ave 3rd Fl Belmont, MA 02478 or go to our website at www.walnuthilladvisorsllc.com.