

Heritage Capital, LLC Privacy Policy

Heritage Capital, LLC (HC) is committed to protecting your privacy and maintaining the confidentiality and security of your personal information. We are sending you this privacy notice to help you understand how we handle the personal information we collect and how we use it to service your account.

Information We Collect

Protecting your nonpublic personal information is an important priority for **HC**. The nature of **HC**'s business requires that we obtain your personal information so that we may work as your Investment Adviser. Therefore, we collect information about you from the Advisory Agreement, account applications and other forms you submit to us for the management of your account. We may also collect your information from the transactional activity in your account and from the experiences you have with products and services we provide. Finally, we may obtain additional personal information from other interactions or communications that you have with **HC**.

Our Disclosure Policies

HC does not disclose your information to anyone, except as permitted by law and as is deemed necessary by **HC** to provide our services to your account. This may include sharing your information with non-affiliated companies that perform support services for your account or process your transactions with us. In addition, we may provide your personal information to governmental or other entities to comply with applicable laws and regulations. Finally, we will release information about you if you direct us to do so.

Confidentiality and Security

We have always considered the protection of sensitive information to be a sound business practice and a foundation of customer trust. We protect the information we collect about you by maintaining physical, electronic and procedural safeguards that meet or exceed applicable legal requirements. In addition, we restrict access to information about you to those employees and contractors who provide necessary services for your account.

Ongoing Commitments

For former clients, **HC** will treat your personal information just as we treat the personal information of our current clients.

HC will continue to keep you informed of its privacy policies by providing you with a Privacy Notice annually. In addition, if any substantial changes occur in the way we collect, use or disseminate your personal information, we will notify you promptly.

Please contact **HC** if you have any questions about this Privacy Notice or if you would like to discuss it in greater detail.