T: 602.899.9396
www.directedira.com

DIRECTED IRA
by Directed Trust Company

Privacy Notice – What We Do with Your Information

Purpose of this Notice

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 do we Collect?

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 account balances
- Account transactions and payment history
- Assets and investment experience

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

How do we Share Your Information?

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 Directed Trust Company chooses to share; and whether you can limit this sharing. Please note we do not sell or share your data with third parties for marketing purposes.

Reasons we can share your personal information	Do we share this?	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 - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We Don't Share
For our affiliates' everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	We Don't Share
For our affiliates to market to you	No	We Don't Share
For non-affiliates to market to you	No	We Don't Share

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Privacy Notice – Continued

How does Directed Trust Company 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 Directed Trust Company collect my personal information?	We collect your personal information, for example, when you • Open an account or deposit money • Provide account information or give us your contact information • Direct us to buy or sell securities • Use your credit or debit card
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 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 choice will apply to everyone on your account, unless you tell us otherwise.

Questions?

- Call (602) 899-9396 or visit our website www.directedira.com

Want to limit our Sharing?

- Contact us – Speak to one of our representatives today by calling (602) 899-9396

Definitions

Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • Neither Directed Trust Company nor its affiliates, (if applicable) share your information with non-affiliates for marketing purposes.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • Directed Trust Company does not participate in joint marketing with non-affiliates.

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