



What does Reliance Trust Company 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
- risk tolerance
- account transactions
- investment experience
- retirement assets
- wire transfer instructions

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's personal 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 Reliance Trust Company chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Reliance Trust share?	Can you limit 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 our nonaffiliates to market to you	No	We don't share

Who We Are

Who is providing this notice?

Reliance Trust Company

What We Do

How does Reliance 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 Reliance Trust Company collect my personal information?

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

- open an account
- show your driver's license
- give us your contact information
- seek advice about your investments
- make deposits or withdrawals from your accounts

We may also collect your personal information from others, such as credit bureaus or other consumer reporting agencies.

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.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- **Reliance Integrated Solutions LLC**
- **Reliance Operations Services LLC**
- **Reliance Insurance/Holmes, Inc.**

Nonaffiliates

- Companies not related by common ownership or control. They can be financial and nonfinancial companies.
- For everyday business purposes to assist in servicing your account or respond to court orders and legal investigations, Reliance Trust Company may disclose your personal information.

Joint marketing

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

- Reliance Trust Company does not engage in joint marketing.

Other Important Information

Your privacy is important to us. If you have any questions, please call Reliance Trust Company at 1-800-749-0752 or go to www.reliance-trust.com.