



## PRIVACY POLICY

### 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:

- account transactions
- retirement assets
- wire transfer instructions
- risk tolerance
- social security number

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 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 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? |
|---|----------------------------|------------------------|
| <b>For our everyday business purposes—</b><br>such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes                        | No                     |
| <b>For our marketing purposes—</b><br>to offer our products and services to you   | Yes                        | No                     |
| <b>For joint marketing with other financial companies</b>   | No                         | We don't share         |
| <b>For our affiliates' everyday business purposes—</b><br>information about your transactions and experiences   | Yes                        | No                     |
| <b>For our affiliates' everyday business purposes—</b><br>information about your creditworthiness   | No                         | We don't share         |
| <b>For our affiliates to market to you</b>  | No                         | We don't share         |
| <b>For our nonaffiliates to market to you</b>   | No                         | We don't share         |

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](http://www.reliance-trust.com).

### Who We Are

#### Who is providing this notice?

Reliance Trust Company – 1100 Abernathy Road, 500 Northpark, Suite 400, Atlanta, Georgia 30328-5646

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

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 Trust Company's affiliates include:

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

**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