



HUNTINGTON STEELE

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FACTS

WHAT DOES HUNTINGTON STEELE 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 and income
• Assets
• Risk Tolerance
• Investment Experience
• Employment Information
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 selection below, we list the reasons financial companies can share their customers' personal information; the reasons Huntington Steele chooses to share; and whether you can limit this sharing.

Table with 3 columns: Reasons we can share your information, Does Huntington Steele share?, and Can you limit this sharing?. Rows include: For our everyday business purposes, For our marketing purposes, For joint marketing with other financial companies, For our affiliate's everyday business purposes (transactions/experiences), For our affiliate's everyday business purposes (creditworthiness), and For nonaffiliates to market you.

Questions? Call (206) 204-0320 or go to www.huntingtonsteele.com

What we do

How does Huntington Steele 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 Huntington Steele collect my personal information?

We collect your personal information, for example when you

- Open an account
- Give us your income information
- Show your government-issued ID
- Seek advice about your investments
- Enter into an advisory contract

Why can't I limit all sharing?

Federal law gives you the right to limit only

- Sharing for affiliate's everyday business purposes - information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you

Definitions

Affiliates

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

- ***Huntington Steele has no affiliates***

Nonaffiliates

Companies not related by common ownership or control. They can be financial and non financial companies.

Nonaffiliates we share with can include:

- ***Our custodians***
- ***Our equity sub-advisors***

Joint marketing

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

- ***Huntington Steele doesn't jointly market***