

Solitude Financial Services Privacy Notice

FACTS	WHAT DOES ADVISER SOLITUDE FINANCIAL SERVICES (“SFS”) 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social security number and assets • Account balances and investment experience • Risk tolerance <p>When you are <i>no longer</i> our customer, we continue to share information about you as described in this notice.</p>	
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 SFS chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does SFS Share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your accounts(s) or 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	No	We don’t share
For joint marketing with other financial companies	No	We don’t share
For our affiliates' everyday business purposes - information about your transactions and experiences	No	We don’t share
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don’t share
For nonaffiliates to market to you	No	We don’t share
Questions?	Call 434-218-2201 or go to https://www.solitudefinancial.com/	

Solitude Financial Services Privacy Notice

Page 2

Who we are

Who is providing this notice?

Solitude Financial Services, Inc.

What we do

How does SFS 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 SFS collect my personal information?

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

- Enter into an investment advisory contract or seek advice about your investments
- Direct us to sell your securities or tell us about your investment or retirement portfolio
- Give us your contact info

We also collect your personal information from other companies.

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.

- *SFS has no affiliates*

Nonaffiliates

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

- *SFS does not share with nonaffiliates so they can market to you*

Joint Marketing

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

- *SFS doesn't jointly market*