

**COURT PLACE ADVISORS, LLC**  
**PRIVACY NOTICE**  
**March 2022**

**Our Pledge**

At Court Place Advisors, LLC, the interests of our clients always come first. The confidentiality of client information has been and will continue to be of greatest importance.

Court Place Advisors, LLC values its client relationships. Our clients entrust us not only with their finances but also with their personal information. We collect this information to operate prudently as well as to meet legal requirements.

We do not sell or rent your name/personal financial information. We will only share certain information with companies (nonaffiliated third parties) for the purpose of servicing your financial needs, as permitted by law. These nonaffiliated third parties are also required to protect the security and confidentiality of the information.

**Q &A about Court Place Advisors, LLC Privacy Notice**

• **What information do we gather from our clients?**

We must collect certain information to meet regulatory and legal requirements and also information necessary to provide investment/financial services to you. This information may include:

- name, address, date of birth, social security number or EIN, drivers license, passport, and other information/documentation that will allow us to identify you
- account balances
- assets and income
- financial transactions and fund transfers

• **How do we protect the security and confidentiality of our clients' information?**

We restrict access to client information to Court Place Advisors Investment Advisor Representatives and to those employees of Court Place Advisors who require access to the information in order to conduct business. These employees and IARs are educated and trained on the importance of maintaining client confidentiality.

We maintain, monitor and update, as needed, our physical, electronic and procedural safeguards that comply with federal regulations so that we may guard your personal information.

• **What information is disclosed to nonaffiliated third parties?**

Court Place Advisors, LLC will use, as necessary, services from nonaffiliated third parties for the purpose of supporting the financial services we provide for our clients. These parties must comply with their privacy policies. Their ability to protect the confidentiality of information is an important consideration in our relationship with them.

We may also disclose information to government agencies and regulatory organizations when required by law.

• **What information is disclosed about former clients?**

If there comes a time when you decide to become an inactive client of Court Place Advisors, we will adhere to the privacy policies as described in this notice.

If you have any questions about **Court Place Advisors, LLC Privacy Notice**, please contact us at 410-465-4321.