

**FACTS****WHAT DOES JANTZ MORGAN LLC  
DO WITH YOUR PERSONAL INFORMATION?**

<b>What?</b>	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.
<b>Why?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• name and address,</li> <li>• information regarding client transactions with us, and</li> <li>• a personal identifier such as, depending on the client's country of residence, a Social Security number, a National Insurance Number, a Tax File Number, etc.</li> </ul> When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.
<b>How?</b>	All financial companies need to share some of your personal information to run their everyday business. In the section below, we list the reasons financial companies can share your personal information; the reasons Jantz Morgan LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Jantz Morgan share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations.	YES	NO
<b>For our marketing purposes—</b> to offer our products and services to you	NO	NO
<b>For joint marketing with other financial companies</b>	NO	YES
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	NO	YES
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	NO	YES
<b>For nonaffiliates to market to you</b>	NO	YES

**Questions?**Call 617.273.8018 or email us at [info@jantzmorgan.com](mailto:info@jantzmorgan.com)

Who we are	
<b>Who is providing this notice?</b>	Jantz Morgan LLC
<b>How does Jantz Morgan protect my personal information?</b>	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.
<b>How does Jantz Morgan collect my personal information?</b>	We collect your personal information, for example, when you open your account with us, or when you contact us to update your contact information.
<b>Why can't I limit all sharing?</b>	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• affiliates from using your information to market to you</li> <li>• sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Definitions	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies.
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
Other Important information	
Under no circumstances does Jantz Morgan sell our clients' names or other information to anyone.	