

DATA SECURITY POLICY

Protecting your information and privacy is our highest priority. Following are the steps that we, Heritage Capital, and your custodian, SEI, take to protect your confidential information.

SEI

Your investments are housed with SEI. The SEI Information Security Program is a comprehensive security infrastructure designed to protect your electronic information from unauthorized disclosure, modification, or misuse. SEI's security protocol includes, but is not limited to:

- robust physical infrastructure security to protect the physical location of the servers where your information is stored.
- tightly controlled software and system architecture.
- endpoint activity monitoring geared to proactively detect malware and would-be intrusions on SEI's systems.
- encryption technology to control the contents of mobile devices and backups.
- annual, internal, and third-party vulnerability tests.
- and much more.

HERITAGE CAPITAL

Our in-house data security systems include software, hardware, and policies to protect your sensitive information from an online or localized attack. These systems quickly identify and remove both email phishing attacks and brute force attacks to our firewall, server, and computers. In office, your data is protected through state-of-the-art fire and security systems, double-shredding practices of all confidential documents, and redundant locking of all physical papers.

We consider protection of your confidential data of the highest importance. As always, please feel welcome to contact us at any time with concerns you may have around data security.

To Your Fiscal Health,



Kelly Crane, CFP®, CLU, CFA, MBA
President