



# LANE

## GENERATIONAL

### Privacy Policy

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Effective: August 18, 2021

Lane Generational, LLC (“Lane” or the “Firm”, also referred to as “we”, “our” and “us”) is committed to safeguarding the use of personal information of our Clients (also referred to as “you” and “your”) that we obtain as your Investment Adviser, as described here in our Privacy Policy (“Policy”).

We understand that you have entrusted us with your private information. We protect the security and confidentiality of the personal information we have and implement controls to ensure that this information is used for proper business purposes in connection with the management or servicing of our relationship with you.

Lane does not sell your non-public personal information to anyone. We do not provide this information to others except for discrete and reasonable business purposes in connection with the servicing and management of your accounts and our relationship with you, as discussed below.

Details of our approach to privacy and how your personal non-public information is collected and used are set forth in this Policy.

#### **Why you need to know**

Registered Investment Advisors (“RIAs”) must share some of your personal information in the course of servicing your account. Federal and State laws give you the right to limit some of this sharing and require RIAs to disclose how we collect, share, and protect your personal information.

#### **What information do we collect from you?**

The types of personal information we collect and share depend on the services you engage us to provide. This information can include:

Driver’s license number	Date of birth
Social security or taxpayer identification number	Assets and liabilities
Name, address and phone numbers	Income and expenses
E-mail addresses	Investment activity
Information about other accounts	Investment experience and goals

#### **How do we protect your information?**

To safeguard your personal information from unauthorized access and use we maintain physical, procedural and electronic security measures. These include such safeguards as secure passwords and encrypted file storage. Our technology vendors provide security and access control over personal information and we have policies over the transmission of data. Our associates are trained on their responsibilities to protect Client’s personal information.

We require third parties that assist in providing our services to you to protect the personal information they receive from us.

### **How do we share your information?**

All financial service firms need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial service firms can share their customers' personal information, the reasons we choose to share, and whether you can limit this sharing.

<b>Basis For Sharing</b>	<b>Do we share?</b>	<b>Can you limit?</b>
<b>For our everyday business purposes</b> , such as to process your transactions, maintain your accounts, respond to court orders and legal investigations, or to report to credit bureaus.	Yes	No
<b>For joint marketing with other companies.</b>	No	Not Shared
<b>For non-affiliates to market to you.</b>	No	Not shared

### **State-specific Regulations**

Lane adheres to all applicable state and federal privacy regulations. Before Lane changes its policy to permit sharing to other companies, residents of Arizona, California, Connecticut, Georgia, Maine, Massachusetts, Minnesota, Montana, Nevada, New Mexico, New Jersey, North Carolina, North Dakota, Ohio, Oregon, Vermont, and Virginia will be provided with an opportunity to opt in for information sharing per applicable state law.

### **Changes to our Privacy Policy**

We will send you a copy of this Policy annually for as long as you maintain a relationship with us.

Periodically we may revise this Policy and will provide you with a revised Policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing if permitted by law.

### **Any Questions?**

You may ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy, by contacting Lane at (617) 865-3949 or via email at [eileen@lanegenerational.com](mailto:eileen@lanegenerational.com).

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