

TrustCore Privacy Policy

This privacy policy pertains to all aspects of business conducted by the TrustCore, LLC family of businesses, including, but not limited to, TrustCore Financial Services, LLC and TrustCore Insurance Agency, LLC.

What does TrustCore, LLC 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?	The types of personal information we collect, and share depend on the product or service you have with us. This information can include: Social Security Number and income Account balances and account history Other information we may need to process a transaction at your request. When you are no longer our customer, we do not share any information unless it is at your request or we are legally required to do so.
How?	All financial companies need to share clients' personal information to run their everyday business. Additional information about this is below.

Collecting Information

We collect nonpublic personal information from the following sources:

- Applications and documents completed by you and your financial representative.
- Your transaction history
- Other sources with your consent

Keeping your nonpublic personal information secure

Your information is 1) viewed only by authorized employees conducting services or functions on your behalf and 2) protected by physical, electronic and procedural safeguards implemented throughout our company.

Our third-party asset custodian partners' privacy policies

Our third-party asset custodian partner for TrustCore Financial Services, LLC is Charles Schwab & Co. Their privacy policy can be found through the following Web link:

- Schwab – <https://client.schwab.com/secure/cc/nn/security/privacy>

Sharing information

Reasons we can share your personal information	Does TrustCore, LLC share?	Can you limit this sharing?
For our everyday business purposes, such as to process your transactions, maintain your account(s) or respond to court orders and legal investigations.	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	Yes
For joint marketing with other financial companies	No	We don't share.
For our affiliates' everyday business purposes – information about your transactions and experiences.	Yes	No
For our affiliates to market to you.	No	We do not share for marketing by our affiliates.
For our nonaffiliates to market to you.	No	We do not share.

What do we do?

How does TrustCore, LLC protect my personal information?	Your information is 1) viewed only by authorized employees conducting services or functions on your behalf and 2) protected by physical, electronic and procedural safeguards implemented throughout our company.
How does TrustCore, LLC collect my personal information?	We collect nonpublic personal information from the following sources: <ul style="list-style-type: none"> • Applications and documents completed by you and your financial representative. • Your transaction history • Other sources with your consent
Why Can't I Limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> • 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.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices apply to everyone on your account.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. We do not sell any nonpublic personal information to any marketing companies, affiliates or nonaffiliates. We do not share any personal information unless: <ul style="list-style-type: none"> • You authorize or request it • It is necessary to process a transaction you initiated • It allows us to expand our services to you
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	<ul style="list-style-type: none"> • It is permitted or required by law • It is to companies within our corporate family to provide products and services to you
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial or nonfinancial companies. We do not sell any nonpublic personal information to any marketing companies, affiliates or nonaffiliates. We do not share any personal information unless:</p> <ul style="list-style-type: none"> • You authorize or request it • It is necessary to process a transaction you initiated • It allows us to expand our services to you • It is permitted or required by law • It is to companies within our corporate family to provide products and services to you
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you. We do not participate in any joint marketing ventures.</p>

Questions?	<p>You may reach out to your advisor with questions about our privacy policy. Additionally, you can contact our Chief Compliance Officer, LaRue G. McIntyre, with questions about our policy, 615-377-1177 or larue.mcintyre@trustcore.com.</p> <p>You may contact us at any time via phone, electronic communication, or mail, to limit our sharing.</p>
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TrustCore LLC. reserves the right to change our privacy policies and procedures at any time. Any changes will be communicated with you as required by law. A copy of our privacy policy may be found on our website, www.TrustCore.com

Receipt of this Notice does not constitute our acceptance of an application for any product or service.