

**SageVest Wealth Management**  
**PRIVACY NOTICE SUPPLEMENT FOR MASSACHUSETTS & VERMONT RESIDENTS**

Investment Advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives customers the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

**TYPES OF NONPUBLIC PERSONAL INFORMATION (“NPI”) WE COLLECT**

We collect NPI about you that is either provided to us by you or obtained by us with your authorization. This can include, but is not limited to, your Social Security number, date of birth, banking information and financial account numbers and/or balances, sources of income, or other Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

**PARTIES TO WHOM WE DISCLOSE INFORMATION**

All Investment Advisers may need to share NPI to run their everyday business. In the section below, we list the typical reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your account(s), or respond to court orders and legal investigations, work with technology providers, compliance consultants, and counsel, or report to credit bureaus;
- For coordination with allied professionals – to coordinate wealth management services by sharing information with your accountant, attorney, insurance agent or other allied professional.

If you are a new customer, we may begin sharing your information on the day you sign our agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing. However, please note we do not use NPI to give to third parties so they may market to you.

**PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT’S INFORMATION**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

**THE RIGHT TO LIMIT SHARING – OPTING OUT AND OPTING IN**

Federal law allows you the right to limit the sharing of your NPI by “opting-out” of the following: (i) sharing for affiliates’ everyday business purposes -- information about your creditworthiness; and (ii) sharing with affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately at our address or telephone number if you choose to opt out of these types of sharing.

Certain states (including Massachusetts and Vermont) give their residents additional rights to limit sharing. Under each state’s applicable law, we may not share NPI with non-affiliates unless we first receive written permission (“opting-in”). If we do not receive permission to share this NPI, then we are prohibited from sharing this NPI with “non-affiliates” as defined below.

**I give you permission to share my NPI with non-affiliates as described herein.**

*Signature of Client(s):* \_\_\_\_\_

*Name of Client(s):* \_\_\_\_\_

**DEFINITIONS:** Affiliates – companies related by common ownership or control. They can be financial and nonfinancial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and nonfinancial companies.