

Atlantic

PRIVATE WEALTH

PRIVACY NOTICE

FACTS	WHAT DOES ATLANTIC PRIVATE WEALTH, 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • name and address (street/city/state) • email address and other contact information (telephone number) • Social Security number • account balances • Employer • types and amounts of investments • investment experience/risk tolerance <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
HOW?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Atlantic Private Wealth, LLC chooses to share; and whether you can limit this sharing.

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

Questions? Call 919.968.2977 or go to atlanticpwa.com

Who we are	
Who is providing this notice? Atlantic Private Wealth, LLC	
What we do	
How does Atlantic Private Wealth, LLC protect my personal information?	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.
How does Atlantic Private Wealth, LLC collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • open an account • make deposits or withdrawals from your account • enter into an investment advisory contract • seek advice about your investments • tell us about your investment or retirement portfolio <p>We also collect your personal information from other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes—information about your creditworthiness • affiliates from using your information to market to you • sharing for nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>

Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <p><i>Atlantic Private Wealth, LLC does not share with our affiliates.</i></p>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <p><i>Atlantic Private Wealth, LLC does not share with nonaffiliates so they can market to you.</i></p>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <p><i>Atlantic Private Wealth, LLC does not jointly market.</i></p>

Notice to California Residents

The Privacy Notice provisions described above detail the types of information that Atlantic Private Wealth, LLC, collects in order to provide investment advisory services to its clients. For our own marketing-related purposes, APW also collects certain information from third-parties who have either expressed interest in APW's services, or have the potential to be APW clients in the future. Under the California Consumer Privacy Act ("CCPA"), California residents have the right to know what personal information about them a business collects, the source(s) of that data, the purpose(s) for which such information was collected, and whether the information is shared with or sold to others. Among other rights, California residents also have the right to request that information about them be deleted by the collector, and may opt out of having the information sold to or shared with others.

APW collects the type of data listed in the "**What?**" section above, both in connection with providing services to clients, and for marketing purposes. Under the CCPA, California residents who are not necessarily clients of the adviser are entitled to inquire as to what marketing-related information about them APW has collected, and how we use that information. Upon a verifiable request from a California consumer or its authorized representative, APW will share with a California resident the information it has collected, free of charge. California residents may request such information by calling **1-919-968-2977**. If APW is able to verify your identity, it will fulfill your request by mail or electronically.

Under the CCPA, California residents also have the right to request that APW delete any personal information that we have collected, subject to certain exceptions. If you wish to request that APW delete this information, please call **1-929-968-2977**. Upon a verifiable request, APW will delete any such information, provided that no exception permitting or requiring its retention applies. In seeking to verify consumer requests, APW will seek to match the information provided by the requesting consumer with the data that has been collected by the adviser. APW does not discriminate against any person based upon the exercise of their rights under the CCPA.

Finally, the CCPA permits a California consumer to instruct a business not to sell her or his personal information. This "opt out" option is not applicable to APW, which, as noted above, does not share or sell the information that it collects.