

**FACTS****WHAT DO FORTIS FAMILY OFFICE ENTITIES DO WITH YOUR PERSONAL INFORMATION?**

<b>Why?</b>	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.	
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social Security number and income</li> <li>• Account balances including cash and security balances</li> <li>• Employment and residential information</li> <li>• Transaction detail history</li> <li>• Investment objectives, goals and risk tolerance</li> </ul>	
<b>How?</b>	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 the "Fortis Family Office Entities" (includes Fortis Advisors, LLC, Fortis Partners, LP, Fortis Solutions, LLC, Fortis Family Office Services, LLC and Fortis Capital Partners, LLC) chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Fortis Wealth Entities share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We do not share
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	No	We do not share
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	No	We do not share
<b>To limit our sharing</b>	<p>Call <b>610-313-0910</b>—our menu will prompt you through your choice(s)</p> <p>If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>	
<b>Questions?</b>	Call 610-313-0910 or go to <a href="http://www.fortisfamilyoffice.com">www.fortisfamilyoffice.com</a>	

## Who we are

### Who is providing this notice?

Fortis Family Office Entities is providing this notice. As defined above, this includes Fortis Advisors, LLC, Fortis Partners, LP, Fortis Solutions, LLC, Fortis Family Office Services, LLC and Fortis Capital Partners, LLC

## What we do

### How does Fortis Family Office Entities 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 Fortis Family Office Entities collect my personal information?

We collect your personal information, for example, when you

- establish an investment advisory relationship
- contract for financial planning services
- open an account or deposit money with custodians
- purchase or sell securities with executing broker-dealers

We also collect your personal information from others, such as custodians, broker-dealers, or other companies.

### Why can't I limit all sharing?

Federal law gives you the right to limit sharing only for

- affiliates' everyday business purposes—information about your creditworthiness
- affiliates to market to you
- non-affiliates 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 will apply to everyone on your account.

## Definitions

### Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies. Fortis Family Office Entities include the following affiliates:

- Fortis Advisors, LLC
- Fortis Partners, LP
- Fortis Solutions, LLC
- Fortis Family Office Services, LLC
- Fortis Capital Partners, LLC

### Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies. Fortis Family Office Entities does not share information with non-affiliates for marketing purposes.

### Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Fortis Family Office Entities does not engage in joint marketing with non-affiliates.