

FACTS	WHAT DOES BRIDGEPORT 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 financial information can include, but is not limited to, the following:</p> <ul style="list-style-type: none"> • Name • Date of birth • Asset and investment experience • Social Security Number • Investment Experience • Assets • Account Numbers • Income • Account Transactions • Contact Information • Account Balance <p>When you are no longer 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 BridgePort chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information:	Does BridgePort Share?	Can you limit this sharing?
For our everyday business purposes – Such as to process your transaction, 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	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates’ everyday business purposes – Information about your transactions and experiences	Yes	No
For our affiliates’ everyday business purposes – Information about your creditworthiness	No	We don’t share
For Affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	No	We don’t share

To limit our sharing	<p>Call 877-411-2737 or visit www.bridgeport.financial .</p> <p>Please note:</p> <p>If you are a new customer, we can begin sharing information 30 days from the date we sent this notice. When you are no longer 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>
Questions?	Call 877-411-2737 or visit www.bridgeport.financial

Who we are	
Who is providing this notice?	This notice is being provided on behalf of BridgePort Financial Solutions, LLC and BridgePort Tax & Business Services, LLC (“BridgePort”).
What we do	
How does BridgePort 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. BridgePort trains its associates on the proper handling of personal information and requires companies that help provide services to you to protect the confidentiality of personal information they receive.
How does BridgePort collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> • Open an account • Direct us to buy securities • Give us your contact information • Seek advice about your investments • Enter into an investment advisory contract We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can’t I limit all sharing?	Federal law gives you the right to limit only: <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 State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choice will apply to everyone on your account – unless you tell us otherwise.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint Marketing	A formal agreement between BridgePort and nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> • <i>Our joint marketing partners include banks, credit unions, retirement plans, and other financial institution programs.</i>
Other important information	
<p>We also comply with more restrictive state laws to the extent they apply. For example, if you reside in California, you have the right to know what personal information is being collected, whether that information is sold or disclosed and to whom, and the right to stop the sale of your personal information. For additional information, please refer to the table detailing your rights under California law at www.bridgeport.financial. With respect to each of the categories of data above, we may also disclose personal information with any person to whom we may transfer any of our rights or obligations under any agreement, or in connection with a sale, merger, or consolidation of our business or other transfer of our assets, whether voluntarily or by operation of law, or to any person who is otherwise deemed to be our successor or transferee.</p>	