

# FACTS

## WHAT DOES FORTITUDE PRIVATE WEALTH INC. 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: <ul style="list-style-type: none"><li>• Social Security number and date of birth</li><li>• Account number, account balances and transaction history</li><li>• Net worth, assets, income, and investment experience</li></ul>																						
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 we choose to share; and whether you can limit this sharing. We will never sell customer information to any affiliates or third parties.																						
<table><tr><th>Reasons we can share your personal information</th><th>Do we share?</th><th>Can you limit this sharing?</th></tr><tr><td><b>For our everyday business purposes to non-affiliates—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus</td><td>YES</td><td>NO</td></tr><tr><td><b>For our marketing purposes—</b> to offer our products and services to you</td><td>NO</td><td>N/A</td></tr><tr><td><b>For joint marketing with other financial companies</b></td><td>NO</td><td>N/A</td></tr><tr><td><b>For our affiliates’ everyday business purposes—</b> information about your transactions, experiences, and creditworthiness</td><td>NO</td><td>N/A</td></tr><tr><td><b>For our affiliates to market to you</b></td><td>NO</td><td>N/A</td></tr><tr><td><b>For non-affiliates to market to you</b></td><td>NO</td><td>N/A</td></tr></table>			Reasons we can share your personal information	Do we share?	Can you limit this sharing?	<b>For our everyday business purposes to non-affiliates—</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	NO	N/A	<b>For joint marketing with other financial companies</b>	NO	N/A	<b>For our affiliates’ everyday business purposes—</b> information about your transactions, experiences, and creditworthiness	NO	N/A	<b>For our affiliates to market to you</b>	NO	N/A	<b>For non-affiliates to market to you</b>	NO	N/A
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To limit our sharing	<p><b>Please note:</b></p> <p>If you are a <i>new</i> customer, we can begin sharing your information from the date you received 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 or provide affirmative consent to sharing, you may: contact us via telephone 317-819-8550, email <a href="mailto:ljzorgor@fortitudeprivatewealth.com">ljzorgor@fortitudeprivatewealth.com</a>, or U.S. Mail 1980 E. 116th St., Suite 350 Carmel, IN 46032</p>																						
Questions?	Call 317-819-8550																						

Who we are	
Who is providing this notice?	<b>Fortitude Private Wealth Inc.</b>
What we do	
How does <b>Fortitude Private Wealth Inc.</b> 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 <b>Fortitude Private Wealth Inc.</b> collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Open an account or deposit money open an account or give us your income information</li> <li>• Seek advice about your investments or tell us about your financial situation</li> <li>• Make deposits or withdrawals your account</li> </ul>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for non-affiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account—unless you tell us otherwise.
Definitions	
<b>Affiliates</b>	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• <b>Fortitude Private Wealth Inc. does not have any affiliates.</b></li> </ul>
<b>Non-affiliates</b>	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies such as Charles Schwab &amp; Co., inc.</p> <ul style="list-style-type: none"> <li>• <b>Fortitude Private Wealth Inc. does not share with nonaffiliates so they can market to you.</b></li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>• <b>Fortitude Private Wealth Inc. does not jointly market.</b></li> </ul>
Other important information	
<p>California and Vermont residents: For accounts with a California or Vermont mailing address, we are required to obtain your affirmative consent to share your personal information with nonaffiliates who do not currently assist us in servicing your account or conducting our business, unless otherwise required or permitted by law. For accounts with a California mailing address, we will not share your personal information with a financial company for joint marketing purposes, except as required or permitted by law. Nevada residents: This notice is being provided pursuant to state law. If you prefer not to receive marketing calls, contact your advisor directly. For more information about this law, contact the Office of the Nevada Attorney General, Bureau of Consumer Protection, 100 N. Carson Street, Carson City, NV 89703. Phone number: 702.486.3132; email: <a href="mailto:aginfo@ag.nv.gov">aginfo@ag.nv.gov</a>.</p>	