

Privacy Statement



Pursuant to the rules established by the Securities and Exchange Commission, this Notice is intended to provide you with our firm's policy regarding privacy. TSG Advice Partners, LLC ("TSG") does not disclose, sell or provide information of a non-public, personal nature to any individual, firm or business, other than the custodian of your assets (Fidelity Investments, Charles Schwab) and except as otherwise provided herein. The information provided to the custodian is limited to the information necessary in order to open your account and to execute purchases, sales and other types of similar transactions.

In the course of providing investment management services, we generally obtain the following confidential and non-public information:

- Date of Birth
- Social Security Number
- Account Information Regarding Investments
- Income

We may also collect and review other information that we deem relevant to provide investment advisory and/or tax preparation services. Such other information may include tax returns, estate planning documents and other similar information. We provide access to non-public, personal information about you only to those employees who need to know that information to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with Federal standards to guard your non-public, personal information. Our staff is advised that the information about your account, your assets and all other confidential information must be maintained in the strictest confidence. Unauthorized disclosure of the information is unacceptable.

In general, the members of our staff are authorized to have access to your account and your account information only for the purposes needed to provide investment advisory and/or tax preparation services.

We will allow access to your information to third parties as needed to effectively operate our business, such as information technology firms, compliance consultants, law firms, etc.

When appropriate to your needs, we will ask for your permission to share your information with other services providers such as attorneys, accountants and insurance agents; however, we will never share this information without your consent.

Other than as provided herein, we do not disclose any non-public, personal information about our customers, or former customers, to anyone except as permitted by law.