

FACTS

WHAT DOES BILL FEW ASSOCIATES, 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? | <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"> ▪ Social Security number ▪ Information we receive from you on applications and other forms ▪ Account balances, retirement assets and transaction history ▪ Employment information including income ▪ Investment experience and risk tolerance ▪ Information collected through an internet “cookie” (information collecting device from a web server) |
| How? | All financial companies need to share client personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client’s personal information; the reasons Bill Few Associates, Inc. chooses to share; and whether you can limit this sharing. |

| Reasons we can share your personal information | Does Bill Few Associates, Inc. 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 | Yes | No |
| For joint marketing with other financial companies | No | We do not share |
| 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 do not share |
| For nonaffiliates to market to you | No | We do not share |

| | |
|-------------------|--|
| Questions? | Contact John E. Jones at 412-630-6000 or email him at jjones@billfew.com |
|-------------------|--|

| Who we are | |
|---|---|
| Who is providing this notice? | Bill Few Associates, Inc. |
| What we do | |
| How does Bill Few Associates, Inc. protect my personal information? | To protect your personal information from unauthorized access and use, we maintain written policies and procedures reasonably designed to safeguard the confidentiality, integrity and security of customer information in our possession. These safeguards include administrative, technical and physical measures to protect against unauthorized access, use, alteration and disclosure of customer information and a documented incident response plan. Bill Few Associates, Inc. also restricts access to your personal information to those employees who need to know that information to provide services to you. We also require our service providers with access to customer information to implement appropriate safeguards and to notify us promptly of any unauthorized access to their customer information systems. |
| How does Bill Few Associates, Inc. collect my personal information? | Client non-public personal information is collected by Bill Few Associates, Inc. in the course of conducting business. This information may be collected from multiple sources. These sources include, but are not limited to, the collection of your information during the performance of our business operations and services, from your accounts and transactions, from applications and other forms, when processing business on your behalf, during electronic, telephone, written, and verbal communications and/or communications with you and with your authorized representatives (such as your attorney, accountant, other financial institutions, or any other third party representative you have authorized), and from other personal information that you provide. |
| Why can't I limit all sharing? | Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ Sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. |
| Definitions | |
| Affiliates | Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ Our affiliates include Bill Few Financial Group, Inc. and Bill Few Associates Employee Stock Ownership Trust |
| Nonaffiliates | Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ Bill Few Associates, Inc. does not share information with nonaffiliates for marketing purposes. |
| Joint marketing | A formal agreement between non-affiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ Bill Few Associates, Inc. does not jointly market. |