

FACTS**What does Moody, Lynn, Lieberson & Walker, LLC 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 can include: <ul style="list-style-type: none"> ■ Personal information such as name, address, date of birth, and Social Security number ■ Account Information such as assets, accounts transactions, and income
How?	All financial companies need to share clients' 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 Moody, Lynn, Lieberson & Walker, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Moody, Lynn, Lieberson, & Walker, LLC share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, manage your account(s), provide services to your account(s), and any regulatory requests	Yes	No
For our marketing purposes— To offer products and services to you	No	N/A
For joint marketing with other financial companies	No	N/A
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— Information about your credit worthiness	No	N/A
For our affiliates to market to you	No	N/A
For nonaffiliates to market to you	No	N/A

Questions? Call 617-973-0590 or email your client team.

What we do

How does Moody, Lynn, Lieberson & Walker, LLC 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. Our technology vendors provide security and access control over personal information and policies over the transmission of data.
How does Moody, Lynn, Lieberson & Walker, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ■ Open an account, provide financial statements, or provide any other documentation to us ■ Provide any personal information through oral, written, or electronic communication We also collect your personal information from others, such as custodians, broker/dealers, clearing firms, accounting firms, and 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 <ul style="list-style-type: none"> ■ sharing for nonaffiliates to market to you
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.