GVA Privacy Policy

GREAT VALLEY ADVISOR GROUP
REGISTERED INVESTMENT ADVISOR

FACTS	WHAT DOES GREAT VALLEY ADVISOR GROUP 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: • Social Security number and income • Assets and transaction history • Investment experience and risk tolerance When you are *no longer* our customer, we continue to share your information as described in this notice.
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 Great Valley Advisor Group, Inc. chooses to share and whether you can limit this sharing.

Reasons we can share your personal information	Does Great Valley Advisor Group, 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	NO	We do not share
For joint marketing with other financial companies	NO	We do not share
For our affiliates' everyday business purposes– information about your transactions and experiences	NO	We do not share
For our affiliates' everyday business purposes– information about your creditworthiness	NO	We do not share
For our affiliates to market to you	NO	We do not share
For non-affiliates to market to you	NO	We do not share

Questions?	Please call (302) 483 – 7200

Who we are	
Who is providing this notice?	Great Valley Advisor Group, Inc.

What we do	
How does Great Valley Advisor Group, Inc. 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 Great Valley Advisor Group, Inc. collect my personal information?	We collect your personal information, for example, when you ▪ Open an account or give us contact information ▪ Enter into an investment adviser contract, seek financial planning assistance or give us your income information ▪ Tell us about your investment or retirement portfolio We also collect your personal information from other companies you transact business with through GVA.
Why can't I limit all sharing?	Federal law gives you the right to limit only ▪ sharing for affiliates' everyday business purposes—information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for non-affiliates 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. ▪ *Great Valley Advisor Group is affiliated with Todd & Todd Accounting, an accounting firm - US Financial Advisors, LLC, a registered Investment Advisor - Great Valley Advisors Insurance Brokers - U.S. Insurance Brokers, LLC*
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ▪ *Great Valley Advisor Group does not share with non-affiliates so they can market to you*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ▪ *Great Valley Advisor Group doesn't jointly market*