Rev. 04/2019

FACTS WHAT DOES TOLLESON WEALTH MANAGEMENT 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 **assets** ■ **Account balances** and **transaction history** ■ **Risk tolerance** and **investment experience**
How?	All financial companies need to share **non-public** personal information to run their everyday business. In the section below, we list the reasons financial companies can share their **non-public** personal information; the reasons **Tolleson Wealth Management** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Tolleson Wealth Management 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 don't share
For joint marketing with other financial companies	Yes	No
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	We don't share
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	No	We don't share

To limit our sharing	■ **888-807-5550** Our menu will prompt through your choice(s). **Please note:** If you are a new customer, we can begin sharing your information **30** days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	Call **888-807-5550**

Who we are	
Who is providing this notice?	TOLLESON WEALTH MANAGEMENT ("Tolleson")

What we do	
How does Tolleson 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 **Tolleson** collect my personal information?	We collect your personal information, for example, when you ■ open an account or apply for a loan ■ pay your bills or show your driver's license ■ give us your contact information We also collect your personal information from others such as credit bureaus, affiliates, or other companies.
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 nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
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	
Affiliates	Companies related by common ownership or control. They can be financial and non financial companies. ■ *Our affiliates include companies with a Tolleson name; financial companies such as Tolleson Private Wealth Management, LP and Tolleson Private Bank.*
Non affiliates	Companies not related by common ownership or control. They can be financial and non financial companies. ■ *Tolleson Wealth Management 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. ■ *Joint marketing is limited solely to delivery of credit card services through our third party provider and only upon request of clients.*

Tolleson Private Bank is chartered under the laws of the State of Texas and by state law is subject to regulatory oversight by the Texas Department of Banking. Any consumer wishing to file a complaint concerning Tolleson Private Bank's sale of checks, activities and/or any other complaint against Tolleson Private Bank should contact the Texas Department of Banking through one of the means indicated below:

In Person or U.S. Mail: 2601 North Lamar Boulevard, Suite 300, Austin, Texas 78705-4294

Telephone No.: 877/276-5554 • Fax No.: 512/475-1313

E-mail: consumer.complaints@dob.texas.gov • Web site: www.dob.texas.gov

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