

## Oak Street Advisors Privacy Policy

### 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 as share depends on the services you receive from us. This information can include:

- Social Security number
- Date of Birth
- Assets
- Liabilities

### How?

All financial companies need to share customer's personal information to run their everyday business – to process transactions, maintain customer accounts, and to report back to our clients. In the section below we list the reasons financial companies can share their customers personal information; the reasons Oak Street Advisors chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Oak Street Advisors share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> To process your transactions; maintain your account	Yes	No
<b>For our marketing purposes</b> To offer services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	No
<b>For non-affiliates to market to you</b>	No	No

### Who?

Your personal information is shared with our custodian TD Ameritrade who provide custodial services and Advyzon who provides portfolio accounting, reporting, and management services. All personal information is encrypted before transmission and stored on secure servers. Original and backup data is encrypted on site and remotely.