

# Privacy Statement

*McGill Advisors is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information collected from current or former clients in connection with any of the services provided by McGill Advisors. Our policy with respect to your personal information is listed below.*

The information we collect from clients includes non-public information that clients provide us by e-mail, orally or through written documents. This information is typically obtained through account applications, retirement plan documents, partnership agreements, personal tax returns and financial statements. In the course of doing business, information may also include investment assets, account balances, transaction history, and credit card information.

In the normal course of business, we disclose personal information to companies that help us process or service your transactions or account(s), including, for example, companies that provide custodial and/or trust services for your investment portfolios. Examples of the types of information provided include name, address, phone number, Social Security number, and information about your investments and investment experience.

In the normal course of business, we may also use unaffiliated/third party service providers to collect, analyze, maintain, store, and /or archive records and other data (in paper, electronic or digital form) that include client personal information. Examples of such services include document storage, email archival, contact and portfolio management, financial planning and related software, online client portal and/or aggregation services.

As part of the providing investment management services to our clients, we may share your information with the other firms in the McGill & Hill Group on an "as needed" basis and with your other advisors, if applicable. For instance, we may assist your CPA in compiling information for your tax returns; we may provide information to the attorney who prepares your estate planning documents. If you do not wish to have your information shared with any/all of these firms, please contact our office to discuss our opt out procedures. If at any time in the future you terminate your relationship with McGill Advisors, non-public information that we have obtained will be treated in accordance with this Statement.

We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with SEC regulators or other law enforcement authorities.

We restrict access to personal information to our employees and agents for business purposes only. We maintain physical, electronic and procedural safeguards to protect your personal information.

We do not sell your personal information to anyone.

We understand the trust you have placed in us as your financial advisor. You rely on us to act in your interest *and* protect the confidentiality of your personal information. Our privacy policy reflects the desire to safeguard your data while providing the best possible service to you. Please call us at (866)-727-6100 if you would like to discuss any aspect of our privacy policy.

*McGill Advisors is a division of Brightworth, LLC, a Registered Investment Advisor headquartered in Atlanta, GA. Brightworth may be reached at (404)760-9000 or toll-free at (800)218-5174. [www.brightworth.com](http://www.brightworth.com)*