

**FACTS****WHAT DOES the EdgeCo Group of Companies and Associates 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 name/address
- financial information and investment objectives
- suitability information and investment experience

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 EdgeCo chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does EdgeCo share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
<b>For our marketing purposes—</b> to offer our products and services to you	YES	NO
<b>For joint marketing with other financial companies</b>	NO	N/A
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	YES	NO
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	NO	N/A
<b>For nonaffiliates to market to you ***</b>	NO	N/A

**Questions?**

Call 800-693-7800 or go to [www.americantcs.com](http://www.americantcs.com)

**Who we are****Who is providing this notice?**

Mid Atlantic Trust Company, American Trust Company, AT Retirement Services, LLC, AmericanTCS Technology, LLC, AT Insurance, LLC, (for additional Companies see below).

## What we do

<b>How does EdgeCo protect my personal information?</b>	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.
<b>How does EdgeCo collect my personal information?</b>	We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>• open an account or transfer an account</li> <li>• update your account or transact in your account</li> <li>• or from your representative regarding your preferences.</li> </ul>
<b>Why can't I limit all sharing?</b>	Federal law gives you the right to limit only <ul style="list-style-type: none"> <li>• sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• affiliates from using your information to market to you</li> <li>• sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>

## Definitions

<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>NewEdge Securities, Inc., NewEdge Advisors, LLC, NewEdge Wealth LLC, LPA Insurance, LLC, EdgeCo Buyer, Inc.; GUA/Uniontown Capital Corp.; EdgeCo Holdings, Inc.; Mid Atlantic Capital Group, Inc.; Mid Atlantic Clearing &amp; Settlement Corporation; NewEdge Capital Group, LLC, New Edge Wealth Holdings L.P., Mid Atlantic FinSource 1, LLC, and Mid Atlantic FinSource 2, LLC.</i></li> </ul>
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>Our nonaffiliated service providers are obligated to keep the personal information we share with them confidential and use it only to provide services specified by EdgeCo. **</i></li> </ul>
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>• <i>EdgeCo does not share personal information with unaffiliated third parties for use in marketing their products or services.</i></li> </ul>

## Other important information

\*\* If you conduct business with EdgeCo through a nonaffiliated investment professional, we may exchange information that we collect with your investment professional or with others they may authorize.

\*\*\* Financial advisors may change brokerage and/or investment advisory firms, and the nonpublic personal information collected by the NewEdge companies (defined below) and your advisor may be provided to the new firm so that your advisor can continue to service your account(s). If you do not want your financial advisor to provide this information to the new firm, please contact us at 800-693-7800 to opt out of this sharing of your personal information. Opt-in states require your affirmative consent before the advisor can provide your nonpublic personal information to the new firm. You may provide or withdraw your consent at any time by contacting us at 800-693-7800.

NewEdge Securities, Inc., NewEdge Advisors, LLC, and NewEdge Wealth, LLC (collectively "NewEdge") are members of the Protocol for Broker Recruiting (Protocol). In the event your financial advisor terminates association with NewEdge and becomes associated with another brokerage or investment advisory firm, NewEdge will permit your financial advisor to take your name, address, phone number, email address, the account title of the accounts serviced, and any additional information approved by the Protocol while your financial advisor was associated with NewEdge to the new firm, if the new firm is also a member of the Protocol. The retention of this limited information by your financial advisor under the Protocol may occur even if you have exercised your rights to limit the sharing of your personal information as described above.

