



## **Kilter Group LLC PRIVACY NOTICE**

Kilter Group LLC (referred to as “Kilter Group”) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients’ nonpublic personal information (“information”). Through this policy and its underlying procedures, Kilter Group attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of Kilter Group to restrict access to all current and former clients’ information (i.e., information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services in furtherance of the client's engagement of Kilter Group. In that regard, Kilter Group may disclose the client’s information: (1) to individuals and/or entities not affiliated with Kilter Group, including, but not limited to the client’s other professional advisors and/or certain service providers that may be recommended or engaged by Kilter Group in furtherance of the client's engagement of Kilter Group (i.e., attorney, accountant, insurance agent, broker-dealer, investment adviser, account custodian, record keeper, proxy management service provider, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing and/or transmittal by Kilter Group to facilitate the commencement/continuation/termination of a business relationship between the client and/or between Kilter Group and a nonaffiliated third party service provider (i.e., broker-dealer, investment adviser, account custodian, record keeper, insurance company, etc.), including, but not limited to, information contained in any document completed and/or executed by the client in furtherance of the client's engagement of Kilter Group (i.e., advisory agreement, client information form, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

Kilter Group permits only authorized employees and affiliates who have signed a copy of Kilter Group’s Privacy Policy to have access to client information. Employees violating Kilter Group’s Privacy Policy will be subject to Kilter Group’s disciplinary process. Additionally, whenever Kilter Group hires other organizations to provide services to Kilter Group’s clients, Kilter Group will require them to sign confidentiality agreements and/or the Privacy Policy.

Should you have any questions regarding the above, please contact Dipen Mehta, Chief Compliance Officer.