



PITCAIRN WEALTH ADVISORS LLC

## Consumer Privacy Notice

Last Updated: March 2026

Pitcairn Wealth Advisors LLC (“Pitcairn”) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its consumers’ and clients’ non-public personal information (“Information”). Through this policy and its underlying procedures, Pitcairn attempts to secure the confidentiality of your records and Information and protect against anticipated threats or hazards to the security or integrity of your records and Information.

It is the policy of Pitcairn to restrict access to and/or the sharing of all current and former clients’ Information to those employees and affiliated/non-affiliated entities who need to know that information in furtherance of the client’s engagement of Pitcairn.

Pitcairn’s **affiliates** include Pitcairn Trust Co. and Pitcairn Insurance Agency LLC.

### Categories of Information We Collect and Share

We may collect various types of Information depending on the products and services we provide you. This information may include:

- Name and Address
- Contact Information Such as E-mail Address and Telephone Number
- Government Identification Numbers such as Social Security and Tax ID Numbers
- Financial Information Such as Net Worth and Investment Objectives
- Tax Information and Returns
- Account Numbers
- Investment Holdings and Account Balances

By example, we collect Information when you open an account, apply for an insurance product, or use services from our affiliates. When you are no longer a client, we may continue to share your Information as described in this Notice. When you use our website, we collect additional information more fully described in our Online Privacy Notice.

### How We Use and Share the Information We Collect

Whatever the purpose may be – whether we share with service providers, consultants, government authorities, or other external entities – we only process and share your Information to the extent reasonably necessary to fulfill your requests and meet our legitimate business and legal objectives. We do **not** share your Personal Information with unaffiliated third parties solely for their own direct marketing purposes. We do not sell your Personal Information. When we disclose Personal Information to external entities to perform support services for

us, we establish by contract that they may access your Personal Information only for the purposes of performing those support services. We disclose, as necessary and whether you are a current or former customer, Information to unaffiliated service providers to establish, maintain, service and report on your Pitcairn relationship (for example: **financial service providers** like broker-dealers, account custodians, record keepers, and independent managers and sub-advisers; and **non-financial service providers** like technology vendors, performance reporting software, customer relationship management software (CRM,) proxy voting and insurance). We also disclose Information when required to do so by judicial or regulatory process, or when otherwise permitted to do so in accordance with applicable federal and state privacy laws and regulations. We may also use what we know about you to potentially offer you other products and services in the future. We may combine your online Information with Information collected from offline or online sources, or Information we already have. We may also use and disclose certain Information to our affiliated companies and others for any purpose allowed by law.

### **To Limit Our Sharing**

Federal law gives you the right to request that we limit sharing of:

- Information for non-affiliates to market to you (we do not share with non-affiliates to market to you)

**California & Vermont Residents:** We will not share your Information with a financial company for joint marketing purposes except as required or permitted by law.

**ANY QUESTIONS OR CONCERNS:** Should you have any questions regarding the above, please contact Ryan Pollard, Chief Compliance Officer.