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FACTS

WHAT DOES HT PARTNERS, LLC 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 Address and Phone Number
- Medical Information and Account Balance, Transaction and Credit History
- Tax Information and Investment History

How?

All financial companies need to share client's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons HT Partners, LLC chooses to share; and whether you can limit this sharing.

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

To limit our sharing

- Call 860-661-4161 —our menu will prompt you through your choice(s) **or**
- Visit us online: www.htptrs.com

Please note:

If you are a *new* customer, we can begin sharing your information 30 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

Questions?

Call 860-661-4161 or go to peter.decker@htptrs.com and e-mail your concerns.

Who we are

Who is providing this notice?	HT PARTNERS, LLC

What we do

How does protect my personal information?	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.
How does collect my personal information?	We collect your personal information, for example, when you ■ complete a client survey or open an account ■ seek investment advice or request help managing a business ■ communicate with us regarding your investments
Why can't I limit all sharing?	Federal law gives you the right to limit only ■ sharing for affiliates' everyday business purposes—information about your creditworthiness ■ affiliates from using your information to market to you ■ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account I hold jointly with someone else?	Your sharing limitation will apply to all persons holding the account.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ■ *Affiliates include Christopher J. Koehm, CPA and Essex Insurance Group*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■

Other important information

We maintain physical, electronic and procedural safeguards that comply with applicable federal and/or state standards to protect your non-public personal information. We have rigorous restrictions on our electronic client data, including the use of ID and password access and secure daily back-up procedures. All physical client files, documents and other records are stored in fire-proof locked cabinets and destroyed or shredded before elimination.