



Sageworth Trust Company  
Privacy Notice

FACTS	WHAT DOES SAGEWORTH TRUST COMPANY DO WITH YOUR PERSONAL INFORMATION?
<b>WHY?</b>	In order to establish and build your relationship with Sageworth, we will collect non-public information (“personal information”) about you. Federal and state law gives customers the right to limit some but not all sharing of this personal information. Federal law also requires us to tell you how we collect, share, and protect your personal information. This notice summarizes how we deal with this information.
<b>WHAT?</b>	Sageworth collects the following personal information about you: <ul style="list-style-type: none"> <li>▪ Name, family’s names, addresses, contact information;</li> <li>▪ Social Security number;</li> <li>▪ Financial statements, tax returns, asset lists, income and investment objectives, relationships, and other facts and details relating to you, your family and your affairs.</li> </ul>
<b>HOW?</b>	As your relationship with Sageworth develops, we will learn much about you, your family, your finances, and your affairs through our meetings, telephone calls and other contacts. We may obtain private information of a similar nature from others who know you. We may obtain private information about you through e-mail and other electronic communications with you and we may gather information relating to your use of our website and online services.

What we do	
<b>How Does Sageworth Protect My Personal Information?</b>	We maintain physical, electronic and procedural security measures to protect your personal information. All of our employees who have access to personal information are trained in the proper handling of client information, have undergone professional background checks, and have signed confidentiality agreements.
<b>Sageworth Holdings, LLC and Sageworth Trust Company of South Dakota, LLC</b>	Sageworth strives to keep all client information confidential. On occasion and only if necessary, Sageworth may share personal information with Sageworth Holdings, LLC (Sageworth’s parent company) and Sageworth Trust Company of South Dakota, LLC.
<b>Third Party Disclosures</b>	Sageworth does not disclose personal information about clients or former clients with non-affiliated companies, except as necessary or advisable to serve you or as permitted by law. For example, Sageworth may need to disclose personal information to non-affiliated third parties in order to (i) transact business or gather information for you or (ii) enable non-affiliated third parties to perform services for or functions on behalf of Sageworth. Before we disclose any personal information about you to our vendors, it is our policy to require each vendor to enter into a confidentiality agreement to protect your privacy.

<b>Opt-Out</b>	If you prefer that Sageworth not disclose your personal information to any non-affiliated third parties, please notify us in writing at 1861 Santa Barbara Drive, Lancaster, PA 17601. Attn: Privacy Opt-Out, or call us at 717-735-8000
<b>Questions?</b>	Please do not hesitate to call us at 717-735-8000