

FACTS**WHAT DO FORTIS WEALTH ENTITIES 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 income
- Account balances including cash and security balances
- Employment and residential information
- Transaction detail history
- Investment objectives, goals and risk tolerance

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 the "Fortis Wealth Entities" (includes Fortis Advisors, LLC, Fortis Partners, LP, Fortis Solutions, LLC, Fortis Family Office, LLC and Fortis Capital Partners, LLC) chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Fortis Wealth Entities 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	No
For joint marketing with other financial companies	Yes	We do not share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	We do not share
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share

To limit our sharing

Call **610-313-0910**—our menu will prompt you through your choice(s)

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 610-313-0910 or go to www.fortis-wealth.com

Who we are	
Who is providing this notice?	Fortis Wealth Entities is providing this notice. As defined above, this includes Fortis Advisors, LLC, Fortis Partners, LP, Fortis Solutions, LLC, Fortis Family Office, LLC and Fortis Capital Partners, LLC
What we do	
How does Fortis Wealth Entities 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 Fortis Wealth Entities collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • establish an investment advisory relationship • contract for financial planning services • open an account or deposit money with custodians • purchase or sell securities with executing broker-dealers <p>We also collect your personal information from others, such as custodians, broker-dealers, or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit sharing only for</p> <ul style="list-style-type: none"> • affiliates' everyday business purposes—information about your creditworthiness • affiliates to market to you • non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies. Fortis Advisors has the following affiliates:</p> <ul style="list-style-type: none"> • Fortis Advisors, LLC • Fortis Partners, LP • Fortis Solutions, LLC • Fortis Family Office, LLC • Fortis Capital Partners, LLC
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Fortis Advisors does not share information with non-affiliates for marketing purposes.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Fortis Advisors does not engage in joint marketing with non-affiliates.