

FACTS

WHAT DOES CapSouth Partners, Inc. (dba CapSouth Wealth Management) 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 Account Numbers
- Account Transactions and Account Balances
- Addresses and Contact Information

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

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

Reasons we can share your personal information	Does CapSouth Partners, Inc. 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	No	N/A
For joint marketing with other financial companies	No	N/A
For our affiliates' everyday business purposes— information about your transactions and experiences	N/A	N/A
For our affiliates' everyday business purposes— information about your creditworthiness	N/A	N/A
For nonaffiliates to market to you	No	N/A

Questions?

Call 334.673.8600 or go to www.capsouthwm.com

Who we are

Who is providing this notice?

CapSouth Partners, Inc.

What we do

How does **CapSouth Partners, Inc.** 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.

We use certain internet and email specific practices such as firewall barriers, encryption and authentication procedures for online privacy.

How does **CapSouth Partners, Inc.** collect my personal information?

We collect your personal information, for example, when you

- Seek financial advice or seek advice about investments
- Enter into a contract with us or request a wire or ACH
- Fill out forms related to services CapSouth provides

Utilize CapSouth to build, review or amend a financial or estate plan.

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.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *CapSouth Partners, Inc. currently does not have any affiliates.*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Nonaffiliates can include attorneys, accountants, custodians, etc. We will only share your information with nonaffiliates with your authorization and for the purpose of providing services to you.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *CapSouth Partners, Inc. doesn't jointly market.*

Other important information

If you have questions or concerns and would like additional information please contact Marshall P. Bolden at mbolden@capsouthpartners.com