

## FACTS

## WHAT DOES WINCHESTER FINANCIAL 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 and payment history
- Credit history and credit scores

## 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 we choose to share; and whether you can limit this sharing.

| Reasons we can share your personal information                                                                                                                                              | Do we share? | Can you limit this sharing? |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-----------------------------|
| <b>For our everyday business purposes—</b><br>such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes          | No                          |
| <b>For our marketing purposes—</b><br>to offer our products and services to you                                                                                                             | Yes          | Yes                         |
| <b>For joint marketing with other financial companies</b>                                                                                                                                   | No           | We don't share              |
| <b>For our affiliates' everyday business purposes—</b><br>information about your transactions and experiences                                                                               | No           | We don't share              |
| <b>For our affiliates' everyday business purposes—</b><br>information about your creditworthiness                                                                                           | No           | We don't share              |
| <b>For our affiliates to market to you</b>                                                                                                                                                  | No           | We don't share              |
| <b>For non-affiliates to market to you</b>                                                                                                                                                  | No           | We don't share              |
| <b>For buying, selling, or sharing of client data gathered for text messaging.</b>                                                                                                          | No           | We don't share              |

## To limit our sharing

- Mail the form below

## Please note:

If you are a *new* customer, we can begin sharing your information from the date you received 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 770-215-2320

## Who we are

|                                      |                             |
|--------------------------------------|-----------------------------|
| <b>Who is providing this notice?</b> | <b>Winchester Financial</b> |
|--------------------------------------|-----------------------------|

## What we do

|                                                          |                                                                                                                                                                                                                  |
|----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>How do we protect my personal information?</b></p> | <p>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.</p> |
|----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                            |                                                                                                                                                       |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| How do we collect my personal information? | <p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Openanaccount or deposit money</li> </ul> |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                              |                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Why can't I limit all sharing?</b></p> | <p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for non-affiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p> |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                                                         |                                                                                   |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <b>What happens when I limit sharing for an account I hold jointly?</b> | Your choices will apply to everyone on your account—unless you tell us otherwise. |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------|

## Definitions

|                   |                                                                                                      |
|-------------------|------------------------------------------------------------------------------------------------------|
| <b>Affiliates</b> | Companies related by common ownership or control. They can be financial and non-financial companies. |
|-------------------|------------------------------------------------------------------------------------------------------|

|                       |                                                                                                         |
|-----------------------|---------------------------------------------------------------------------------------------------------|
| <b>Non-affiliates</b> | Companies not related by common ownership or control. They can be financial and nonfinancial companies. |
|-----------------------|---------------------------------------------------------------------------------------------------------|

|                        |                                                                                                                           |
|------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Joint marketing</b> | A formal agreement between non-affiliated financial companies that together market financial products or services to you. |
|------------------------|---------------------------------------------------------------------------------------------------------------------------|

## Mail-in Form

|                                                                                                                                                                   |                                                                                                                        |                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p>If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.</p> <p><input type="checkbox"/> Apply only to me</p> | <p>Mark any you want to limit:</p> <p><input type="checkbox"/> Do not use my personal information to market to me.</p> |                             |
|                                                                                                                                                                   | <b>Name</b>                                                                                                            | <b>Mail to:</b>             |
|                                                                                                                                                                   |                                                                                                                        | <b>Winchester Financial</b> |
|                                                                                                                                                                   | <b>Address</b>                                                                                                         | 3675 Crestwood Pkwy         |
|                                                                                                                                                                   |                                                                                                                        | Suite 400                   |
| <b>City, State, Zip</b>                                                                                                                                           |                                                                                                                        | Duluth, GA 30096            |
| <b>Account #</b>                                                                                                                                                  |                                                                                                                        |                             |

|                                                     |                         |  |                                                                                                        |
|-----------------------------------------------------|-------------------------|--|--------------------------------------------------------------------------------------------------------|
| below.<br><input type="checkbox"/> Apply only to me | <b>Name</b>             |  | <b>Mail to:</b><br><b>Winchester Financial</b><br>3675 Crestwood Pkwy<br>Suite 400<br>Duluth, GA 30096 |
|                                                     |                         |  |                                                                                                        |
|                                                     | <b>Address</b>          |  |                                                                                                        |
|                                                     |                         |  |                                                                                                        |
|                                                     | <b>City, State, Zip</b> |  |                                                                                                        |
|                                                     | <b>Account #</b>        |  |                                                                                                        |

☐ Do not use my personal information to market to me.

☐ Do not use my personal information to market to me.

|      |          |
|------|----------|
| Name | Mail to: |
|------|----------|

|         |                                  |
|---------|----------------------------------|
| Address | 3675 Crestwood Pkwy<br>Suite 400 |
|---------|----------------------------------|

City, State, Zip Durham, NC 27708

| Account # | Account Name | Account Type | Account Status | Account Balance | Account Date | Account Location                            | Account Contact        | Account Notes                           |
|-----------|--------------|--------------|----------------|-----------------|--------------|---------------------------------------------|------------------------|-----------------------------------------|
| 1001      | John Doe     | Individual   | Active         | \$1,200.00      | 2023-10-27   | 123 Main St, New York, NY 10001             | John.Doe@Example.com   | Initial setup and account verification. |
| 1002      | Jane Smith   | Individual   | Active         | \$850.00        | 2023-10-27   | 456 Elm St, Los Angeles, CA 90001           | Jane.Smith@Example.com | Standard account setup.                 |
| 1003      | ABC Corp     | Business     | Active         | \$5,000.00      | 2023-10-27   | 789 Market St, San Francisco, CA 94102      | Accounting@ABC.com     | Corporate account with special terms.   |
| 1004      | XYZ Inc      | Business     | Active         | \$3,500.00      | 2023-10-27   | 101 Park Ave, New York, NY 10022            | Finance@XYZ.com        | Business account for XYZ Inc.           |
| 1005      | DEF LLC      | Business     | Active         | \$2,100.00      | 2023-10-27   | 202 Broadway, New York, NY 10007            | Operations@DEF.com     | Business account for DEF LLC.           |
| 1006      | GHI LLC      | Business     | Active         | \$1,800.00      | 2023-10-27   | 303 Third Ave, New York, NY 10017           | Support@GHI.com        | Business account for GHI LLC.           |
| 1007      | JKL LLC      | Business     | Active         | \$1,500.00      | 2023-10-27   | 404 Fourth Ave, New York, NY 10017          | Marketing@JKL.com      | Business account for JKL LLC.           |
| 1008      | MNO LLC      | Business     | Active         | \$1,200.00      | 2023-10-27   | 505 Fifth Ave, New York, NY 10017           | HR@MNO.com             | Business account for MNO LLC.           |
| 1009      | PQR LLC      | Business     | Active         | \$900.00        | 2023-10-27   | 606 Sixth Ave, New York, NY 10017           | Legal@PQR.com          | Business account for PQR LLC.           |
| 1010      | STU LLC      | Business     | Active         | \$700.00        | 2023-10-27   | 707 Seventh Ave, New York, NY 10017         | IT@STU.com             | Business account for STU LLC.           |
| 1011      | VWX LLC      | Business     | Active         | \$600.00        | 2023-10-27   | 808 Eighth Ave, New York, NY 10017          | Operations@VWX.com     | Business account for VWX LLC.           |
| 1012      | YZA LLC      | Business     | Active         | \$500.00        | 2023-10-27   | 909 Ninth Ave, New York, NY 10017           | Finance@YZA.com        | Business account for YZA LLC.           |
| 1013      | BCD LLC      | Business     | Active         | \$400.00        | 2023-10-27   | 1010 Tenth Ave, New York, NY 10017          | Marketing@BCD.com      | Business account for BCD LLC.           |
| 1014      | EFG LLC      | Business     | Active         | \$300.00        | 2023-10-27   | 1111 Eleventh Ave, New York, NY 10017       | HR@EFG.com             | Business account for EFG LLC.           |
| 1015      | HIJ LLC      | Business     | Active         | \$200.00        | 2023-10-27   | 1212 Twelfth Ave, New York, NY 10017        | Legal@HIJ.com          | Business account for HIJ LLC.           |
| 1016      | KLM LLC      | Business     | Active         | \$100.00        | 2023-10-27   | 1313 Thirteenth Ave, New York, NY 10017     | IT@KLM.com             | Business account for KLM LLC.           |
| 1017      | NOP LLC      | Business     | Active         | \$50.00         | 2023-10-27   | 1414 Fourteenth Ave, New York, NY 10017     | Operations@NOP.com     | Business account for NOP LLC.           |
| 1018      | QRS LLC      | Business     | Active         | \$25.00         | 2023-10-27   | 1515 Fifteenth Ave, New York, NY 10017      | Finance@QRS.com        | Business account for QRS LLC.           |
| 1019      | TUV LLC      | Business     | Active         | \$12.50         | 2023-10-27   | 1616 Sixteenth Ave, New York, NY 10017      | Marketing@TUV.com      | Business account for TUV LLC.           |
| 1020      | WXY LLC      | Business     | Active         | \$6.25          | 2023-10-27   | 1717 Seventeenth Ave, New York, NY 10017    | HR@WXY.com             | Business account for WXY LLC.           |
| 1021      | ZAB LLC      | Business     | Active         | \$3.12          | 2023-10-27   | 1818 Eighteenth Ave, New York, NY 10017     | Legal@ZAB.com          | Business account for ZAB LLC.           |
| 1022      | ABC LLC      | Business     | Active         | \$1.56          | 2023-10-27   | 1919 Nineteenth Ave, New York, NY 10017     | IT@ABC.com             | Business account for ABC LLC.           |
| 1023      | DEF LLC      | Business     | Active         | \$0.78          | 2023-10-27   | 2020 Twentieth Ave, New York, NY 10017      | Operations@DEF.com     | Business account for DEF LLC.           |
| 1024      | GHI LLC      | Business     | Active         | \$0.39          | 2023-10-27   | 2121 Twenty-first Ave, New York, NY 10017   | Finance@GHI.com        | Business account for GHI LLC.           |
| 1025      | JKL LLC      | Business     | Active         | \$0.19          | 2023-10-27   | 2222 Twenty-second Ave, New York, NY 10017  | Marketing@JKL.com      | Business account for JKL LLC.           |
| 1026      | MNO LLC      | Business     | Active         | \$0.09          | 2023-10-27   | 2323 Twenty-third Ave, New York, NY 10017   | HR@MNO.com             | Business account for MNO LLC.           |
| 1027      | PQR LLC      | Business     | Active         | \$0.05          | 2023-10-27   | 2424 Twenty-fourth Ave, New York, NY 10017  | Legal@PQR.com          | Business account for PQR LLC.           |
| 1028      | STU LLC      | Business     | Active         | \$0.02          | 2023-10-27   | 2525 Twenty-fifth Ave, New York, NY 10017   | IT@STU.com             | Business account for STU LLC.           |
| 1029      | VWX LLC      | Business     | Active         | \$0.01          | 2023-10-27   | 2626 Twenty-sixth Ave, New York, NY 10017   | Operations@VWX.com     | Business account for VWX LLC.           |
| 1030      | YZA LLC      | Business     | Active         | \$0.00          | 2023-10-27   | 2727 Twenty-seventh Ave, New York, NY 10017 | Finance@YZA.com        | Business account for YZA LLC.           |
| 1031      | BCD LLC      | Business     | Active         | \$0.00          | 2023-10-27   | 2828 Twenty-eighth Ave, New York, NY 10017  | Marketing@BCD.com      | Business account for BCD LLC.           |
| 1032      | EFG LLC      | Business     | Active         | \$0.00          | 2023-10-27   | 2929 Twenty-ninth Ave, New York, NY 10017   | HR@EFG.com             | Business account for EFG LLC.           |
| 1033      | HIJ LLC      | Business     | Active         | \$0.00          | 2023-10-27   | 3030 Thirtieth Ave, New York, NY 10017      | Legal@HIJ.com          | Business account for HIJ LLC.           |
| 1034      | KLM LLC      | Business     | Active         | \$0.00          | 2023-10-27   | 3131 Thirty-first Ave, New York, NY 10017   | IT@KLM.com             | Business account for KLM LLC.           |
| 1035      | NOP LLC      | Business     | Active         | \$0.00          | 2023-10-27   | 3232 Thirty-second Ave, New York, NY 10017  | Operations@NOP.com     | Business account for NOP LLC.           |
| 1036      | QRS LLC      | Business     | Active         | \$0.00          | 2023-1       |                                             |                        |                                         |

**Mail to:**

## Winchester Financial

3675 Crestwood Pkwy

Suite 400

Duluth, GA 30096