

FACTS	<p>THIS PRIVACY POLICY DESCRIBES HOW VENTURI WEALTH MANAGEMENT, LLC COLLECTS, USES, AND SHARES YOUR PERSONALLY IDENTIFIABLE INFORMATION WHEN YOU CONTACT US AND WHEN WE PROVIDE SERVICES TO YOU. PROSPECTS WHO SHARE PERSONALLY IDENTIFIABLE INFORMATION TO VENTURI ARE ALSO TREATED AS CLIENTS UNDER OUR PRIVACY POLICY.</p>	
Why?	<p>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.</p>	
What?	<p>Venturi stores, processes, and maintains information and data related to you in order to provide support and offer you services. The types of personal information we collect, and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security Number and driver's license number • Name and date of birth • Marital status • Address and phone number(s) • Email address(es) • Account information – account numbers, balances and transaction history • Wire transfer instructions 	
How?	<p>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 Venturi Wealth Management, LLC chooses to share; and whether you can limit this sharing.</p>	
Reasons we can share your personal information	Does Venturi Wealth Management, 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 to 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	No	N/A
For our affiliates to market to you	No	N/A
For nonaffiliates to market to you	No	N/A
What we do		
How does Venturi Wealth Management, LLC protect my personal information?	<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 does Venturi Wealth Management, LLC collect my personal information?	<p>Venturi stores, processes, maintains and will use client's personally identifiable information in order to provide client support and services. We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • Enter into an advisory agreement • Open or close an account • Brokerage account applications • Make a wire transfer • Authorize a trade or authorize a direct fee-deduction • Authorize to raise cash • Information you provide to us orally
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> • 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 <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Security	Venturi takes commercially reasonable steps to protect clients' information from loss, misuse, unauthorized access, disclosure, or destruction in accordance with applicable law.
Third Party Websites	We may provide links to access other websites that are not operated or controlled by Venturi. These policies herein do not apply to any third-party websites.
Phishing Scams	Venturi does not send emails to users or customers requesting billing, login, user ID or password information. If you receive an email purporting to be Venturi that asks you to provide personal information or account information, or login and passwords, do not provide such information unless you have first verified that the website or email is from Venturi. Such emails may be fraudulent and used in connection with scams known as phishing.
Changes	We will send you a copy of this Policy Annually for as long as you maintain an ongoing relationship with us. Periodically we may revise this Policy and will provide you with a revised Policy if the changes materially alter the Previous Privacy Policy.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies.
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <p><i>These include broker/dealers, mutual fund companies, insurance companies and other financial institutions.</i></p>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <p><i>Venturi Wealth Management, LLC, does not participate in joint marketing.</i></p>
Questions?	Call (512) 220-2035