



## Altruist GLBA Notice

Altruist Corp

Last revised: February 18, 2026

FACTS	WHAT DOES ALTRUIST DO WITH YOUR PERSONAL INFORMATION?
<b>Why?</b>	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.
<b>What?</b>	<p>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"> <li>• Social Security Number</li> <li>• Income</li> <li>• Bank Information, bank account holder information</li> <li>• Account balances and transaction history</li> <li>• Account transactions and checking account information</li> <li>• EIN, and other tax related information</li> <li>• Copies of legal identification documents including but not limited to passports, ID cards, utility bills, etc.</li> <li>• Payment history, credit history, assets, investment experience, overdraft history, purchase history, risk tolerance, credit card or other debts, mortgage rates and payments; retirement assets, employment information, wire transfer instructions</li> <li>• Corporate structure, net worth, controlling person information, and other items relevant to satisfying KYC and AML policy and procedure</li> </ul>
<b>How?</b>	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 Altruist chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Altruist share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as processing your transactions, maintaining your account(s), responding to court orders and legal investigations, or reporting to credit bureaus	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	N/A
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes—</b>	No	N/A

information about your creditworthiness		
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	No	N/A

<b>To limit our sharing</b>	<p>To limit sharing with our affiliates for purposes of marketing to you:</p> <ul style="list-style-type: none"> <li>Email <a href="mailto:privacy@altruist.com">privacy@altruist.com</a> - Please include "Limit Sharing" in the subject line of the email and include the following opt-out statements in the body of the email: "Do not allow your affiliates to use my personal information to market to me."</li> </ul> <p>To limit sharing of your information with other members of your household, as designated by your advisor, as described in Section 3 of our Privacy Policy:</p> <ul style="list-style-type: none"> <li>Email <a href="mailto:privacy@altruist.com">privacy@altruist.com</a> - Please include "Limit Householding" in the subject line of the email and include the following opt-out statement in the body of the email: "Do not allow my information to be shared with other members of my household."</li> </ul> <p><b>Please note:</b> 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.</p> <p>However, you can contact us at any time to limit our sharing.</p>
<b>Questions?</b>	Email <a href="mailto:privacy@altruist.com">privacy@altruist.com</a> .

<b>Who we are</b>	
<b>Who is providing this notice?</b>	Altruist Corp; Altruist Financial LLC; Altruist LLC; Altruist Advisors LLC; Shareholders Service Group, LLC (together "Altruist").
<b>What we do</b>	
<b>How does Altruist protect my personal information?</b>	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. Additional information about how we protect your information can be found at <a href="http://altruist.com/security">altruist.com/security</a> .
<b>How does Altruist collect my personal information?</b>	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Open an account</li> <li>• Give us your contact information</li> <li>• Make deposits or withdrawals from your account</li> <li>• Direct us to buy or sell securities or other brokerage products</li> <li>• Make a wire transfer</li> <li>• Show your government issued ID</li> <li>• Interact with our social media pages</li> <li>• Register or attend one of our events</li> <li>• Visit our site</li> </ul> <p>We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.</p>

<b>Why can't I limit all sharing?</b>	Federal law gives you the right to limit only <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 nonaffiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing.
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account - unless you tell us otherwise.
<b>Definitions</b>	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. Our affiliates include companies with an Altruist name, including: <ul style="list-style-type: none"> <li>• Altruist Corp</li> <li>• Altruist Financial LLC</li> <li>• Altruist LLC</li> <li>• Altruist Advisors LLC</li> <li>• Shareholders Service Group, LLC</li> </ul>
<b>Non Affiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• Nonaffiliates we share with can include service providers such as data processors. Altruist does not share with nonaffiliates so they can market to you.</li> </ul>
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Altruist does not jointly market.
<b>Other important information</b>	
<p><b>THE AFFILIATED ALTRUIST COMPANIES</b> may share information about you with the other affiliated Altruist companies, including your income and account history.</p> <p>Federal law gives you the right to limit some but not all marketing from Altruist affiliates. Federal law also requires us to give you this notice to tell you about your choice to limit marketing from Altruist affiliates.</p> <p>You may limit Altruist affiliates from marketing their products or services to you based on the personal information that we collect and share with them. This information includes your income and your account history with us.</p> <p>Your choice to limit marketing offers from Altruist affiliates will apply until you tell us to change your choice.</p> <p>If you have already made a choice to limit marketing offers from our affiliate, you do not need to act again until you receive the renewal notice.</p> <p><b>To limit marketing offers, email <a href="mailto:privacy@altruist.com">privacy@altruist.com</a>.</b></p>	