

GreenPort Capital Advisors, LLC
Privacy Notice

GreenPort Capital Advisors, LLC is committed to protecting the privacy of our clients. As a result, we have established policies and practices that protect your privacy. **Please read the Notice carefully.**

Information We Collect

In the ordinary course of business, we collect and retain information about you and activities involving your accounts in order to administer to your affairs. This information, known as non-public personal information, is collected from a number of sources and includes: information we receive from you on applications, contracts, and other forms (such as name, address, social security number, etc.); information about your transactions (such as account balances, transfers, trade activity); and in some cases information from other third parties (such as brokerage firms providing separate managed accounts).

Disclosure of Information to Provide Service for Your Accounts

We will not sell or rent customer information or lists to non-affiliated third parties for the purposes of marketing their products or services. We do not share information with non-affiliated companies unless you have given us permission to do so or unless it is necessary to maintain or service your account; provided however, you may “opt out” of disclosures to non-affiliated third parties.

In order to provide services you request during the course of your relationship with us, we may need to disclose the information we collect (as described above) to the following types of third parties:

Your advisors and financial service providers, such as your accountants, banks, custodians, insurance agents, legal counsel, and mortgage lenders;

Parties involved in particular investments, such as broker-dealers, privately held entities in which you invest (such as limited partnerships and venture-round companies), the principals of such entities, and real estate brokers; and

Others, such as designated family members, trustees, and regulatory agencies.

Please rest assured that we do not disclose the information we collect about our clients or former clients to anyone, except as permitted or required by law. We limit the use of your personal information with non-affiliated companies to the performance of the specific service that we have requested. We restrict access to authorized individuals who need to know this information to provide service to you. All of our employees are trained and required to protect the confidentiality of your information. We do not disclose information about present or former customers to anyone, except as permitted or required by law.

If, at any time in the future, it becomes necessary to disclose any of your personal information in a way that is inconsistent with this policy, you will be given advance notice of the proposed change so that you will have the opportunity to “opt out” of such disclosure.

Security of Information

We maintain physical, electronic, and procedural safeguards that comply with all applicable laws to protect your non-public personal information. This includes the collection, maintenance and disposal of such information.

Updating Our Records

You have the right to obtain access to the personal information we have recorded about you. If you identify any inaccuracy in your personal information or you need to make a change to that information, please contact us so that we may promptly update our records.

If you have questions concerning this notice or would like additional information regarding privacy policies, please contact us at:

Mail: GreenPort Capital Advisors, LLC
33 Bradford St
Concord, MA 01742

Email: info@greenportcapitaladvisors.com
Phone: (978) 393-3090

This Notice is required by law.