

## **The Boston Family Office Privacy Notice**

We value the trust you have placed in us and are committed to safeguarding your privacy. Our commitment to confidentiality is as follows:

1. We do not disclose any nonpublic personal information about you to third parties except:
  - Where disclosure is authorized by you;
  - To companies that help us process or service your account(s) and transactions, including custodian banks, brokers, and accountants, or
  - In limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with regulators or law enforcement authorities, resolve consumer disputes, or for institutional risk control.
2. We may collect nonpublic personal information about you from the following sources:
  - Information we receive from you directly or on applications or other forms;
  - Information about your securities holdings from your custodian or broker;
  - Information about your transactions with us, our affiliates, or others; and
  - Information we receive from your tax, legal, and other advisors.
3. The type of personal identifiable information we may collect about you includes but is not limited to:
  - Name
  - Mailing address
  - Email address
  - Telephone number
  - Birthdate
4. You have rights regarding your access and control of the information we collect about you, including:
  - The right to be informed about information collection, processing, and protections;
  - Inquiring about and accessing the information we have collected about you;
  - Request changes or corrections to the information we have collected;
  - Request deletion of the information we have collected;
  - Inquiring about how and why the information we have collected may be used, including any automated decision-making processes;
  - Expressing concerns or complaints about how we collect and use your data.
5. Any inquiries, requests, or complaints about the use of your data should be sent via email to the Chief Compliance Officer at [darrenb@bosfam.com](mailto:darrenb@bosfam.com).
6. We restrict access to nonpublic personal information about you to our employees and agents for business purposes only. All employees are required to safeguard such information and are provided only the minimum access required for their work responsibilities.
7. We maintain physical, electronic, and procedural safeguards that comply with state, federal, and regulatory standards to guard your nonpublic personal information. More information on our safeguards may be provided to you upon request.
8. We have a static website, meaning that no client information is stored or accessible from that public address.

9. We will provide you with advance notice of changes in our information-sharing practices so that you may exercise any of your legal rights regarding our ability to share your information.
10. We adhere to these privacy policies and practices for both current and former customers.