

# 1st Source Bank Wealth Advisory Services Privacy Notice

**FACTS** WHAT DOES 1st SOURCE BANK WEALTH ADVISORY SERVICES (WAS) 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 employment information  Investment experience and risk tolerance  Checking account information and wire transfer instructions

**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 chosen to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does 1st Source Bank WAS share?	Can you limit this sharing?
<b>For our everyday business purposes</b> — 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> — to offer our products and services to you.	Yes	No
<b>For joint marketing with other financial companies</b>	No	We don't share.
<b>For our affiliates' everyday business purposes</b> — information about your transactions and experiences.	Yes	No
<b>For our affiliates' everyday business purposes</b> — information about your creditworthiness.	No	We don't share.
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</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 30 days from the date we provide 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 574 235-2790

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**Mail-in Form**

Do not allow your affiliates to use my personal information to market to me.  
 If you have a joint account, your choice will apply to everyone on your account unless you mark here  Apply my choice only to me.

PLEASE PRINT

Name	
Address	
City, State, Zip	
Social Security Number(s)	

**Mail To:** 1st Source Bank Wealth Advisory Services, 100 N. Michigan Street, 5th Floor, South Bend, IN 46601

## Who we are

<b>Who is providing this notice?</b>	This notice is provided by 1st Source Bank Wealth Advisory Services, a business unit of 1st Source Bank. This notice does not govern any other relationships you may have with 1st Source Bank.
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## What we do

<b>How does 1st Source Bank Wealth Advisory Services 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, secured files and secured buildings, limited access of your personal financial information to only those employees who need it to perform their jobs, and confidentiality agreements with service providers.
<b>How does 1st Source Bank Wealth Advisory Services 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>■ seek financial or tax advice</li> <li>■ seek advice about your investments</li> <li>■ enter into an investment advisory contract</li> <li>■ tell us about your investment or retirement earnings</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>	<p>Federal law gives you the right to limit only for</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 nonaffiliates 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 with someone else?</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 nonfinancial companies. Our affiliates include companies with the 1st Source name.
<b>Nonaffiliates</b>	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>■ 1st Source Bank Wealth Advisory Services does not share with nonaffiliates so they can market to you.</li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>■ 1st Source Bank Wealth Advisory Services does not jointly market.</li> </ul>

