



Important Information about Your Portfolio with Moody Aldrich Partners

Privacy Notice

Protecting the Privacy of Client Records and Information

Moody Aldrich Partners, LLC (MAP) is committed to upholding the interests of our clients. For this reason, we keep your personal information as confidential as possible for your general welfare. MAP will not disclose personal information to anyone unless it is:

- required by law
- at your direction
- or necessary for providing you with our best service

We have not and will not sell your personal information to anyone for any reason.

Information We Will Collect

In order to properly manage your account, MAP collects and maintains the following types of information concerning you:

- information we receive from you or your financial advisor upon opening your account
- information we generate to service your account (such as trade tickets and account statements)
- information we receive from third parties with respect to your account (such as trade confirmations from brokerage firms)

Who Receives Information and Why

In order to properly manage your account, MAP may also disclose the personal information collected above to the following:

- the Securities and Exchange Commission (all of our records are subject to review during SEC examinations)
- brokers (for trading purposes)
- our accountants / auditor (in checking billings & receivables, etc.)
- consultants upon your direction

How We Protect Your Information

MAP maintains certain safeguards to ensure that your personal information is protected now as well as in all future matters, including closed accounts. These safeguards include enforcing policies that physically and electronically keep client information safe, and allowing only those employees needing your personal information for their job completion to have access to it with the understanding that it is to be regarded in strictest confidence.

Where to Find Out More

We are pleased to inform you of the policies we maintain to ensure that your personal information is kept secure. Should you have any questions or comments concerning our privacy practices please call (781) 639-2750 or write to:

Amanda Velluto
Chief Compliance Officer
Moody Aldrich Partners, LLC
18 Sewall Street, Marblehead, MA 01945

A copy of this privacy statement is provided to each client upon entering into an advisory agreement with MAP and will be provided to each client annually thereafter.

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