

FACTS

WHAT DOES BRIDGEVIEW CAPITAL ADVISORS, INC. 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: ■ Name, address, email, Social Security Number, date of birth ■ Personal financial information, including investment objectives, risk tolerance, income, assets, liabilities, tax information, retirement plan information, account holdings, transactions, and information provided by custodians, third-party managers, plan fiduciaries, or other client-authorized parties. ■ Investment and bank account numbers When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.
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 Bridgeview Capital Advisors, Inc. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Bridgeview share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), and respond to court orders and legal investigations	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	N/A
For our affiliates' everyday business purposes— information about your transactions and experiences	No	N/A
For our affiliates' everyday business purposes— information about your creditworthiness	No	N/A
For our affiliates to market to you	No	N/A
For nonaffiliates to market to you	No	N/A

Questions?	Call 916-235-6857 or go to www.bridgeviewadvisors.com
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Who we are

Who is providing this notice?

Bridgeview Capital Advisors, Inc.

What we do

How does Bridgeview Capital Advisors, Inc. protect my personal information?

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.

How does Bridgeview Capital Advisors, Inc. collect my personal information?

We collect your personal information, for example, when you

- Open an account
- Complete our financial questionnaire
- Share financial statements and tax returns

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *None*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Charles Schwab & Co., Inc. and Orion Advisor Solutions
- Custodians, broker-dealers, portfolio management and reporting platforms
- Third-party money managers, technology providers, and compliance consultants
- Accountants, attorneys, pension consultants, regulators, and other service providers.

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *None*

Other important information

State laws may provide additional rights to limit sharing. We will comply with applicable federal and state privacy laws.