

Financial companies elect how they share your personal information. Federal law allows consumers the right to limit some, but not all, shared information. Federal law also requires financial companies to inform you of how your personal information is collected, shared, and protected. Please read this notice carefully to understand what Mercer Global Advisors (“Mercer Advisors”) does with your personal information.

**WHAT:** The types of personal information we collect and share depend on the service(s) we provide you. This information can include:

- Social Security Number
- Investment assets
- Account transactions
- Income
- Retirement assets
- Investment experience

In the event that you are no longer a Mercer Advisors client, we will continue to share your information as outlined in this notice.

**HOW:** Financial companies must share personal client information to operate their day-to-day business. Listed below are the ways in which financial companies can share their clients’ personal information; whether Mercer Advisors has elected to share; and if you are able to limit such sharing.

**QUESTIONS:** Please send all questions, in writing, to:  
Mercer Global Advisors, Attention: Compliance Department, 1200 17th Street, Suite 500, Denver, Colorado 80202

<b>HOW YOUR PERSONAL INFORMATION CAN BE SHARED</b>	<b>Does Mercer Advisors share this information?</b>	<b>Can you limit this sharing?</b>
<b>For everyday business purposes</b> – such as to process your transactions, maintain your account(s), respond to court orders and/or legal investigations, or report to credit bureaus	Yes	No
<b>For marketing purposes</b> – to offer our services to you	No	Not Shared
<b>For joint marketing with other financial companies</b>	Yes	No
<b>For affiliates’ everyday business purposes</b> – information about your transactions and experiences	Yes	No
<b>For affiliates’ everyday business purposes</b> – information about your creditworthiness	No	Not Shared
<b>For affiliates to market to you</b>	No	Not Shared
<b>For non-affiliates to market to you</b>	No	Not Shared

**WHAT WE DO**

**How does Mercer Advisors 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.  
Mercer Advisors maintains physical, electronic, and procedural safeguards to protect your non-public personal information.

**When does Mercer Advisors collect my personal information?** We collect your personal information when you:  

- Open an account
- Make a deposit or withdrawal
- Enter into an Investment Advisory Agreement
- Provide account information

 Additionally, we may receive information about you from information services and consumer reporting agencies.

**What types of information sharing can I limit?** Federal law allows you the right to limit only the following:  

- Sharing for affiliates’ everyday business purposes – information about your creditworthiness
- Affiliates using your information to market to you
- Non-affiliates using your information to market to you

 State laws and individual companies may provide you with additional rights to limit sharing. See back for more information regarding your rights under state law.

## DEFINITIONS

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- Affiliates** Companies related by common ownership or control. These can be financial and/or non-financial companies.
- Mercer Advisors does not share information with its affiliates for marketing purposes.
- Non-affiliates** Companies not related by common ownership or control. These can be financial and/or non-financial companies.
- Mercer Advisors does not share information with non-affiliates for marketing purposes.
  - Mercer Advisors shares information with third-party consultants for data processing and analytics reporting purposes.
- Joint marketing** A formal agreement between non-affiliated financial companies that together market financial services to you.
- Our joint marketing partners include our custodians, sub-advisors, retirement third-party administrators (TPAs), and other financial institution programs.

## OTHER IMPORTANT INFORMATION

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This notice applies to individual consumers who are clients or former clients of Mercer Advisors. This notice replaces all previous Privacy Policy notices from Mercer Advisors and may be amended at any time. Any amendment made to this notice will be provided to you as required by law. If you close your Mercer Advisors account(s) and transfer to another firm, we may share your information with your new broker/dealer, custodian, and/or advisor during the transfer process.

**For California Residents:**

The California Consumer Privacy Act (“CCPA”) gives California consumers certain privacy rights related to their personal information. Mercer Advisors’ “California Privacy Policy” may be found on our website.

**For Nevada Residents:**

Under Nevada law, you may request, in writing, to be placed on our internal “Do Not Call” list. Nevada law requires that we also provide you with the following contact information: Bureau of Consumer Protection, Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; Phone number: (702) 486-3132; email: BCPINFO@ag.state.nv.us.

**For Oregon Residents:**

We will not share your Personal Information or Browsing Information with nonaffiliated third parties for marketing purposes, except after you have been informed by us of such sharing and had an opportunity to indicate that you do not want a disclosure made for marketing purposes.

**For Vermont Residents:**

We will not disclose information about your creditworthiness to our affiliates and will not disclose your personal information, financial information, credit report, or health information to nonaffiliated third parties to market to you, other than as permitted by Vermont law, unless you authorize us to make those disclosures.