

Contact Center: (800) 248-8447 | [www.ForgeTrust.com](http://www.ForgeTrust.com)

## FACTS WHAT DOES FORGE TRUST CO. DO WITH YOUR PERSONAL INFORMATION?

<b>Why?</b>	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.
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Information we receive directly from you on applications and other forms.</li> <li>• Information needed to complete your transactions with us.</li> <li>• Information about your transactions with non-affiliated third parties.</li> </ul>
<b>How?</b>	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 Forge Trust Co. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Forge Trust Co. Share?	Can you limit this sharing?
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Reasons we can share your personal information	Does Forge Trust Co. 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	Yes
<b>For joint marketing with other financial companies</b>	No	No
<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	Yes	Yes
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For nonaffiliates to market to you</b>	No	No

<b>To limit our sharing</b>	Obtain the form "Privacy Notice - Limit Sharing" at <a href="http://www.forgetrust.com">www.forgetrust.com</a> . Delivery options are provided on the form.
	If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent 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.
<b>Questions?</b>	Call 800-248-8447

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## WHO WE ARE

<b>Who is providing this notice?</b>	Forge Trust Co.
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## WHAT WE DO

<b>How does Forge Trust Co. 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 and secured files and buildings.
<b>How does Forge Trust Co. collect my personal information?</b>	We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>• open an account, make an investment, or deposit money</li> <li>• request a distribution or pay your fees</li> </ul>
<b>Why can't I limit all sharing?</b>	Federal law gives you the right to limit only <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> State laws and individual companies may give you additional rights to limit sharing.
<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 in writing.

## DEFINITIONS

<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>Forge Trust Co.'s affiliates include wholly owned subsidiaries of Forge Global Holdings, Inc. including but not limited to: Forge Securities, LLC, a registered broker-dealer; Forge Global Advisors, LLC; Forge Lending, LLC and Forge Data, LLC.</i></li> </ul>
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>Forge Trust Co. does not share with nonaffiliates.</i></li> </ul>
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>• <i>Forge Trust Co. does not jointly market.</i></li> </ul>

## OTHER IMPORTANT INFORMATION

Forge Trust Co.'s use of your personal information is governed by this notice and the privacy policy at [www.forgeglobal.com/privacy-policy](http://www.forgeglobal.com/privacy-policy). If there is any conflict between this notice and that policy, this notice will control.