

BOSTON PRIVATE

WEALTH ▫ TRUST ▫ PRIVATE BANKING

FACTS	WHAT DOES BOSTON PRIVATE WEALTH LLC 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <table border="0"> <tr> <td><input type="checkbox"/> Social Security number</td> <td><input type="checkbox"/> Retirement assets</td> </tr> <tr> <td><input type="checkbox"/> Account balances</td> <td><input type="checkbox"/> Investment experience</td> </tr> <tr> <td><input type="checkbox"/> Transaction history</td> <td><input type="checkbox"/> Wire transfer instructions</td> </tr> </table> <p>When you are no longer our client, we continue to share your information as described in this notice.</p>		<input type="checkbox"/> Social Security number	<input type="checkbox"/> Retirement assets	<input type="checkbox"/> Account balances	<input type="checkbox"/> Investment experience	<input type="checkbox"/> Transaction history	<input type="checkbox"/> Wire transfer instructions
<input type="checkbox"/> Social Security number	<input type="checkbox"/> Retirement assets							
<input type="checkbox"/> Account balances	<input type="checkbox"/> Investment experience							
<input type="checkbox"/> Transaction history	<input type="checkbox"/> 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 Boston Private Wealth LLC chooses to share; and whether you can limit this sharing.							
Reasons we can share your personal information	Does Boston Private Wealth LLC share?	Can you limit this sharing?						
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No						
For our marketing purposes – to offer our products and services to you	Yes	No						
For joint marketing with other financial companies	No	We don't share						
For our affiliates' everyday business purposes – information about your transactions and experience	Yes	No						
For our affiliates' everyday business purposes – information about your creditworthiness	Yes	Yes						
For our affiliates to market to you	Yes	Yes						
For nonaffiliates to market to you	No	We don't share						
To limit our sharing	<input type="checkbox"/> Visit www.bostonprivate.com/privacy-optout <input type="checkbox"/> Mail the form below Please note: <i>If you are a new 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.</i>							
Questions?	Go to www.bostonprivate.com/privacy-optout or Call 800-422-6172							

Mail-in Form

<p>If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below</p> <p><input type="checkbox"/> Apply my choices only to me</p>	<p>Mark any/all you want to limit:</p> <p><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.</p> <p><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</p>	
	Name	
	Address	
	City, State, Zip	
	Account Number(s)	
		<p>Mail to:</p> <p>Boston Private Wealth LLC P.O. Box 961972 Boston, MA 02196</p>

Who we are	
Who is providing this notice?	Boston Private Wealth LLC
What we do	
How does Boston Private Wealth LLC 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. We also maintain other physical, electronic and procedural safeguards to protect this information and we limit access to information to those employees for whom access is appropriate.
How does Boston Private Wealth LLC collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> <input type="checkbox"/> Open an account <input type="checkbox"/> Provide account information <input type="checkbox"/> Apply for a loan <input type="checkbox"/> Give us your contact information <input type="checkbox"/> Make a deposit or withdrawals from your account We also collect your information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <input type="checkbox"/> sharing for affiliates' everyday business purposes – information about your creditworthiness <input type="checkbox"/> affiliates from using your information to market to you <input type="checkbox"/> sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account – unless you tell us otherwise.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none"> <input type="checkbox"/> <i>Our affiliates include our holding company, Boston Private Financial Holdings, Inc., and our affiliate Boston Private Bank & Trust Company.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none"> <input type="checkbox"/> <i>Boston Private Wealth LLC does not share with nonaffiliates so they can market to you.</i>
Joint Marketing	A formal agreement between nonaffiliated financial companies to jointly market financial products or services to you. <ul style="list-style-type: none"> <input type="checkbox"/> <i>Boston Private Wealth LLC does not jointly market.</i>
Other Important Information	
<p>For California residents: In accordance with California law, we will not share information we collect about you with companies outside of our corporate family, except as permitted by law, including, for example, with your consent or to service your account. We will limit sharing among our companies to the extent required by California law. Boston Private Wealth LLC has established standards and practices to comply with the restrictions in limiting the disclosure of information relating to private trusts (including managed agency accounts) for which Boston Private Wealth LLC serves as investment manager.</p> <p>For Massachusetts residents: Boston Private Wealth LLC has established standards and practices to ensure compliance with the provisions of M.G.L. c. 93H and 201 C.M.R. 17.00 in connection with the safeguarding of personal information contained in both paper and electronic records for residents of the Commonwealth of Massachusetts.</p>	