



## 2025 PRIVACY POLICY STATEMENT

### Facts

What does FIFTH AVENUE FAMILY OFFICE (Fifth Avenue FO) 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 service we provide. This information can include, but would not be limited to:

- your social security number and income;
- your address and date of birth; and
- your account balances and transactions.

### How?

Financial companies typically need to share customers' personal information internally to run their everyday business – to process transactions, maintain or service customer accounts, and report to credit bureaus. In the section below, we list why many financial companies can share their customers' personal information, why Fifth Avenue FO chooses to share your information, and whether you can limit this sharing.

Reasons we can share your personal information	Does FIFTH AVENUE FO share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> To process your transactions, open accounts, and report to credit bureaus	Yes	No
<b>For our marketing purposes –</b> To offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	N/A - We don't share





<b>For our affiliates' everyday business purposes –</b> Information about your transactions and experience	No	N/A - We don't share
<b>For our affiliates' everyday business purposes –</b> Information about your creditworthiness	No	N/A - We don't share
<b>For our affiliates to market to you</b>	No	N/A - We don't share
<b>For non-affiliates to market to you</b>	No	N/A - We don't share

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With Your Personal Information?

Sharing practices	
<b>How often does FIFTH AVENUE FO notify me about their practices?</b>	We must notify you about our sharing practices when you engage our services and each year while you are a customer.
<b>How does FIFTH AVENUE FO protect my personal information?</b>	We use security measures that comply with federal law to protect your personal information from unauthorized access and use. These measures include computer safeguards and secured files and offices.
<b>How does FIFTH AVENUE FO collect my personal information?</b>	We collect certain personal information from you, such as when you open an account.
<b>Why can't I limit all sharing?</b>	<p>Federal law gives you the right to limit sharing only for</p> <ul style="list-style-type: none"> <li>▪ affiliates' everyday business purposes – information about your creditworthiness;</li> <li>▪ affiliates to market to you; and</li> <li>▪ non-affiliates to market to you.</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
<b>How does FIFTH AVENUE FO treat my personal information once I am no longer a customer?</b>	The firm will provide nonpublic information about former customers only if required by law or regulation or to those parties who need such information for the firm to carry out any continued obligation with respect to the services covered by the former adviser/customer relationship.





# FIFTH AVENUE

## FAMILY OFFICE®

### Definitions

<b>Everyday business purposes</b>	<p>The actions necessary by financial companies to run their businesses and manage customer accounts, such as</p> <ul style="list-style-type: none"><li>▪ processing transactions, mailing, and auditing services;</li><li>▪ providing information to credit bureaus; and/or</li><li>▪ responding to court orders and legal investigations.</li></ul>
<b>Affiliates</b>	<p>Companies related by common ownership or control. They can be financial and non-financial companies.</p>
<b>Non-affiliates</b>	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"><li>▪ <b>Fifth Avenue Family Office does not share with non-affiliates so that they can market to you.</b></li></ul>
<b>Joint Marketing</b>	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"><li>▪ <b>Fifth Avenue Family Office does not jointly market.</b></li></ul>

### Contact Us

If you have any questions, please call Chief Compliance Officer Kyle Shoemaker at 239-261-9363 or email [kyle@fifthavenuefamily.com](mailto:kyle@fifthavenuefamily.com)

