

FACTS

WHAT DOES RESHAPE, LLC (“RESHAPE”) 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> <ul style="list-style-type: none"> ■ Name, mailing address and email address; ■ Social security number; ■ Investments and account balances; and ■ Information about your financial situation, including your employment or occupation, banking information, and other financial and tax information. <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
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 Reshape chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Reshape 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	No	We don’t share
For joint marketing with other financial companies	No	We don’t share
For our affiliates’ everyday business purposes — information about your transactions and experiences	No	We don’t share
For our affiliates’ everyday business purposes — information about your creditworthiness	No	We don’t share
For nonaffiliates to market to you	No	We don’t share

Questions?	Call (646) 626-7902
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Who we are

Who is providing this notice?

Reshape, LLC (“Reshape”)

What we do

How does Reshape 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 limit access to your personal information to appropriate personnel with a business need for it. We educate our personnel on how to protect your information

How does Reshape collect my personal information?

We collect your personal information, for example, when you

- open an account or give us your contact information
- tell us about your portfolio or deposit or withdraw money
- enter into an investment advisory contract

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.

- Reshape does not share your personal information with affiliates.

Nonaffiliates

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

- Reshape does not share your personal information with nonaffiliates.

Joint marketing

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

- Reshape does not jointly market.

Other important information

Phone numbers collected for SMS consent will not be shared with third parties or affiliates for marketing purposes under any circumstance.