# Privacy Policy

(Rev: March 2019)

***How and Why We Obtain Information***

RKL Wealth collects information about you to help us serve your financial needs, provide customer service, offer new products or services, and fulfill legal and regulatory requirements. Any collection of personal information is to support our normal business operations and service your account.

The nonpublic personal, financial, and health information RKL Wealth collects comes from you. The information collected may come from the following sources:

- Information on applications and related forms, such as name, address, telephone number, email address, social security number, tax ID numbers, assets and income, personal financial information such as bank accounts, taxes and medical information if applying for insurance;
- Information regarding your transactions with us, such as products or services purchased, account numbers, balances, and payment history;
- Information from your employer, association, or benefit plan sponsor, such as name, address, social security number, assets, and income regarding group products, which we may provide or assist in reviewing on your behalf.

***Sharing Information***

RKL Wealth does not disclose nonpublic personal information about you to any non-affiliated third-parties, except as permitted by law. In the course of servicing your account, we may share information collected about our clients, as previously described above, with unaffiliated service providers such as insurance companies, mutual fund companies, custodians or other investment firms to provide account maintenance or customer service to your account. We may also share your information with our affiliate or one of its subsidiaries for marketing purposes. Additionally, we may be required by law or regulation to disclose information to third-parties such as in response to a subpoena to prevent fraud, to comply with rules and regulations to which we are subject, in response to industry regulators and/or in order to comply with your custodian's policies. We may also disclose your information to other organizations as permitted by law such as government agencies and law enforcement officials (for example, for tax reporting or under court order), or to other organizations and individuals with your written consent (for example, to an attorney or tax professional).

Federal law gives you the right to limit sharing of your private, nonpublic information with affiliates and non-affiliates for the purpose of marketing to you. To opt out, please call the Chief Compliance Officer at (717) 399-1700 or email us at compliance@rklwealth.com.

***Protecting Your Information***

RKL Wealth maintains physical, electronic, and procedural safeguards to guard your nonpublic personal information to ensure that we are complying with our own policy, industry practices, and federal or state regulations. If you decide to close your account(s) or become an inactive client, we will adhere to the privacy policies and practices as described in this notice.

RKL Wealth reserves the right to change this Privacy Policy at any time. If there is a change in our policy and how we share your information, we will notify you prior to sharing the information and give you the option to disapprove. Please let us know if you have any questions or comments regarding our privacy policy.