

FACTS	WHAT DOES 55I, LLC (“55ip”) 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 depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ▪ Social Security number and income ▪ Account balances and transaction history ▪ Investment experience 																						
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 55ip chooses to share; and whether you can limit this sharing.																						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Reasons we can share your personal information</th> <th style="width: 25%;">Does 55ip share?</th> <th style="width: 25%;">Can you limit this sharing?</th> </tr> </thead> <tbody> <tr> <td>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</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">No</td> </tr> <tr> <td>For our marketing purposes – to offer our products and services to you</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">No</td> </tr> <tr> <td>For joint marketing with other financial companies</td> <td style="text-align: center;">No</td> <td style="text-align: center;">We don’t share</td> </tr> <tr> <td>For our Affiliates’ everyday business purposes – information about your transactions and experiences</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">No</td> </tr> <tr> <td>For our Affiliates’ everyday business purposes – information about your creditworthiness</td> <td style="text-align: center;">No</td> <td style="text-align: center;">We don’t share</td> </tr> <tr> <td>For Nonaffiliates to market to you</td> <td style="text-align: center;">No</td> <td style="text-align: center;">We don’t share</td> </tr> </tbody> </table>			Reasons we can share your personal information	Does 55ip 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 experiences	Yes	No	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
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Questions?	Call (617) 960-9559																						

Who we are	
Who is providing this notice?	55I, LLC ("55ip")
What we do	
How does 55ip 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.
How does 55ip collect my personal information?	<p>We collect your personal information, for example, when:</p> <ul style="list-style-type: none"> ■ your advisor enters into a sub-advisory or trade list delivery agreement with 55ip ■ you tell us about your investment or retirement portfolio ■ you seek financial or tax advice ■ you provide account information <p>We also collect your personal information from other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> ■ 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
Definitions	
Affiliates	<p>Companies related by common ownership and control. They can be financial and nonfinancial companies. <i>Our affiliates include companies such as J.P. Morgan's Asset Management business</i></p>
Nonaffiliates	<p>Companies not related by common ownership and control. They can be financial or nonfinancial companies. <i>55ip does not share with nonaffiliates so they can market to you</i></p>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or service to you. <i>55ip does not jointly market</i></p>