

# EAST COAST

## ASSET MANAGEMENT



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## Privacy Statement

### MISSION STATEMENT

East Coast Asset Management, LLC is committed to protecting your privacy. As a professional firm, we strongly believe that our relationship with our clients is our greatest asset. To that end, we have taken steps to protect your non-public personal information.

### PERSONAL INFORMATION THAT WE COLLECT

East Coast Asset Management, LLC collects and maintains your personal information so that we can provide investment management and financial planning services to you. The information that we may collect includes but is not limited to:

- Information that we receive from you to open an account or provide investment advice to you (such as your name, address, telephone number, marital status, social security number and other financial information);
- Information that we generate to service your account (such as account balances, parties to transactions, trade tickets and account statements); and
- Information that we may receive from third parties with respect to your accounts (such as financial documents, trade confirmations from brokerage firms and other documents).

### SHARING OF CLIENT INFORMATION

We do not share non-public personal information with anyone except as required or permitted by law. We share client information to complete transactions that you request or to inform you of other services or products that we offer, including:

- Disclosures to companies as permitted by law, including those necessary to service your account such as custodians or brokers;
- Disclosures to regulatory agencies, such as the Securities and Exchange Commission and local and state regulators; and
- Disclosure to companies, subject to confidentiality agreements that perform services on our behalf. This may include computer service providers, law firms and other businesses that provide services to us.

### PROTECTING YOUR PERSONAL INFORMATION

East Coast Asset Management, LLC has taken the following measures to safeguard your information.

- We maintain physical, electronic and procedural safeguards designed to protect your information;
- Limiting access to information to only those employees or contractors who need to access it to provide services to you; and
- Continue to protect information of former clients.

This statement replaces all previous statements of our privacy policy. As required by law, we will notify you annually of our privacy policy. We reserve the right to modify this policy at any time and will keep you informed of changes.