

FACTS**WHAT DOES CLEARSTEAD TRUST, LLC 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"> • Contact information (including Name, Postal Address, Email Address) • Social Security number/Tax-Identification Number • Assets and Income • Account balances and transaction history • Money movement instructions <p>When you are no longer our client, we continue to store and 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 Clearstead Trust chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Clearstead Trust 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 do not share
For joint marketing with other financial companies	No	We do not 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 do not share
For our affiliates to market to you	No	We do not share
For non-affiliates to market to you	No	We do not share

To limit our sharing or Questions	<ul style="list-style-type: none"> • Call 216-621-1090 • Visit us online: www.clearsteadtrust.com <p>Please note:</p> <p>If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>
--	---

Who we are

Who is providing this notice?

Clearstead Trust, LLC

What we do

How does Clearstead Trust 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 Clearstead Trust collect my personal information?

We collect the personal information provided by you, for example, when you

- Enter into an advisory agreement
- Seek financial advice
- Open accounts that Clearstead Trust has access
- Make deposits or withdrawals from your account
- Tell us about your investment or retirement accounts
- Provide tax documents
- Provide information on non-investment assets
- Give us your employment history

We also collect your personal information from other companies

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 non-affiliates 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.

- Clearstead Trust, LLC is a wholly owned subsidiary of Clearstead Advisors, LLC.

Nonaffiliates

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

- Clearstead Trust does NOT share with non-affiliates.

Joint marketing

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

- Clearstead Trust does NOT jointly market with non-affiliates.

Other important information