



PRIVACY POLICY NOTICE

TO OUR CLIENTS

Carnegie Investment Counsel collects non-public personal information about you from the following sources:

- Information we receive from you on an application or other forms,
- Information about your transactions with us or others,
- Information gained through our client meetings and other interactions, as well as meetings and/or discussions with others such as your legal and tax advisors

Carnegie restricts access to your personal and account information to those employees who need to know that information to provide products or services to you. Carnegie maintains physical, electronic and procedural safeguards to guard your non-public personal information.

None of your personal non-public information is shared with any third party, except as permitted by law and only when necessary in the course of providing you with investment management services and counsel. In almost all cases, the only information we share with anyone outside our office is for essential dealings with service providers such as a transaction broker or securities custodian.

If ever in the future our business relationship with you were to be severed, we will adhere to the privacy policies and practices described in the notice.