

THE COMMUNITY FOUNDATION FOR GREATER NEW HAVEN, INC.
PRIVACY POLICY

February 28, 2025

FACTS

WHAT DOES THE COMMUNITY FOUNDATION FOR GREATER NEW HAVEN, INC. DO WITH YOUR ORGANIZATION INFORMATION?

Why?

Registered Investment Advisers choose how they share your information. Federal law gives clients the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your information. Please read this notice carefully to understand what we do.

What?

The types of information we collect can include:

- Information you provide in the subscription documents and other fund agreement forms (including name, address, tax identification number); and
- Financial data about your transaction(s) with us.

How?

All Registered Investment Advisers need to share clients' information to run their everyday business. In the section below, we list the reasons The Community Foundation for Greater New Haven, Inc. chooses to share clients' information, and whether you can limit this sharing.

Reasons we can share your information

For our everyday business purposes— to process your transactions, maintain your account (s) (for example, we may share with our third-party service providers that perform services on our behalf or on your behalf, such as accountants, attorneys, consultants, clearing and custodial firms, regulatory entities, and technology companies), respond to court orders and legal investigations, or report to credit bureaus.

For Marketing purposes— to present our results with our clients.

How do we protect your information?

To safeguard your information from unauthorized access and use, we maintain physical, procedural, and electronic safeguards. These include computer safeguards such as passwords, secured files, and buildings.

Our employees are advised to respect the confidentiality of each client's non-public information. We train our employees on their responsibilities, including required annual compliance review.

We require third parties that assist in providing our services to you to protect the information they receive. This includes contractual language in our third-party agreements.

Other essential information

We will send you notice of our Privacy Policy annually for as long as you maintain a relationship with us. Periodically we may revise our Privacy Policy and will provide you with a revised policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.

END OF PRIVACY POLICY