

# Credit Value Partners, LLC

## Privacy Policy Notice

Rev. 11/2020

FACTS	WHAT DOES CREDIT VALUE PARTNERS LLC (“CVP”) 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?	The types of personal information we collect and share depends on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>▪ Social Security Number</li> <li>▪ Income</li> <li>▪ Account balances and assets</li> <li>▪ Transaction history</li> </ul>	
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 CVP chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does CVP share?	Can you limit this sharing?
<b>For our everyday business purposes</b> – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes</b> – to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	Not Applicable
<b>For our Affiliates’ everyday business purposes</b> – information about your transactions and experiences	No	Not Applicable
<b>For our Affiliates’ everyday business purposes</b> – information about your creditworthiness	No	Yes
<b>For our Affiliates to market to you</b>	No	Yes
<b>For Nonaffiliates to market to you</b>	No	Not Applicable
To limit our sharing?	<ul style="list-style-type: none"> <li>• Call (203) 893-4700</li> <li>• Email: <a href="mailto:ir@cvp7.com">ir@cvp7.com</a></li> <li>• Mail the <b>form</b> below</li> </ul>	

# Credit Value Partners, LLC

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Who we are	
Who is providing this notice?	Credit Value Partners, LLC ("CVP")
What we do	
How does CVP 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 building.
How does CVP collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"><li>▪ Submit an application or contract request forms</li><li>▪ Open an account</li><li>▪ Deposit money</li><li>▪ Seek advice about your investments</li><li>▪ Enter into an investment advisory contract</li><li>▪ Tell us about your investment or retirement portfolio or income</li><li>▪ Communicate with our Support team</li></ul> <p>We also collect your personal information from other companies.</p>
Definitions	
Affiliates	<p>Companies related by common ownership and control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"><li>▪ Not Applicable</li></ul>
Nonaffiliates	<p>Companies not related by common ownership and control. They can be financial or nonfinancial companies.</p> <ul style="list-style-type: none"><li>▪ Not Applicable</li></ul>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or service to you.</p> <ul style="list-style-type: none"><li>▪ Not Applicable</li></ul>

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## **Mail-in Form**

Leave Blank OR

**[If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.**

**Apply my choices only to me]**

Mark any/all you want to limit:

- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

**Name:**

**Address:**

**City, State, Zip:**

**Account #:**

**Mail to:**

Credit Value Partners, LLC

49 West Putnam Avenue

Greenwich, CT 06830