

Rev. July 2023

FACTS	WHAT DOES TOWNSQUA WITH YOUR PERSONAL I		'OWNSQUARE") DO	
Why?	gives consumers the right to lin us to tell you how we collect,	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?	service you have with us. This Social Security is employment infi- account balance risk tolerance account transact assets and incom investment exper- transaction histor	 account balances risk tolerance account transactions assets and income investment experience transaction history and wire transfer instructions When you are no longer our customer, we continue to share your information as		
How?	All financial companies need everyday business. In the section share their customers' personal	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 TownSquare chooses to share; and whether you can limit this sharing.		
REASONS WE CAN SHARE YOUR PERSONAL INFORMATION		DOES TOWNSQUARE 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		Yes	No	
For joint marketing with other financial companies		No	No	
For our affiliates' everyday business purposes – information about your transactions and experiences		Yes	No	
For our affiliates' even information about you	eryday business purposes – r 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	



A N O R I O N C O M P A N Y

Who We Are		
Who is providing this notice?	TownSquare Capital, LLC	
What We Do		
How does TownSquare 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 TownSquare collect my personal information?	 We collect your personal information, for example, when you: open an account provide account information give us your income information give us your contact information provide employment information tell us about your investments or retirement portfolio seek advice about your investments 	
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. Our affiliates include financial companies such as Brinker Capital Securities, LLC and Orion Portfolio Solutions, LLC. Non-financial company affiliates include Orion Advisor Technology, LLC and others.	
Nonaffiliates	 Companies not related by common ownership or control. They can be financial and nonfinancial companies. TownSquare does not share with nonaffiliates so they can market to you. 	
Joint Marketing	 A formal agreement between non affiliated financial companies that together market financial products or services to you. Our joint marketing partners include financial institutions. 	
Other Important Information	• Our joint marketing partners include financial institutions.	
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Questions?	Call (385)375-8650 or go to www.townsquarecapital.com	