



MAR VISTA

Privacy Notice

FACTS	WHAT DOES MAR VISTA INVESTMENT PARTNERS, LLC (“MAR VISTA”) 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 depends on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security number and/or Tax I.D. number • Account balances • Account transactions and transaction history • Wire transfer instructions • Checking account information <p>When you are <i>no longer</i> our customer, we continue to 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 Mar Vista chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Mar Vista 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	We do not share
For our affiliates' everyday business purposes – information about your transactions and experiences	No	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	We do not share
For our affiliates to market to you – Mar Vista may share information with our affiliates about clients or client accounts in order to make clients aware of services and products which Mar Vista thinks may be of interest or value to them	Yes	No
For non-affiliates to market to you	No	We do not share

To Limit Mar Vista's Sharing	<p>To limit our sharing, please notify us in one of the following ways:</p> <ul style="list-style-type: none"> • Contact Mar Vista by calling our toll-free phone number 800-993-1070. • Email Mar Vista at compliance@marvistainvestments.com.
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	If you are a new customer, we can begin sharing your information immediately from the date we sent this notice. When you are no longer a customer, we continue to share your information as described in this notice.
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Questions?	If you have any questions or concerns regarding this notice or Mar Vista’s privacy policies, please contact us at 800-993-1070.
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Who we are	
Who is providing this notice?	Mar Vista Investment Partners, LLC

What we do	
How does Mar Vista 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 Mar Vista collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> ▪ Open an account ▪ Provide account information ▪ Give us your contact information ▪ Make a wire transfer <p>We also collect your personal information from others, such as credit bureaus or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> ▪ 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 <p>State laws and individual companies may give you additional rights to limit sharing.</p>

Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Mar Vista has an affiliate relationship with F/m Managers Group, LLC. Mar Vista has an arms-length service level agreement with Hood River Capital Management to provide them back and middle office services.</i>
Non-affiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Mar Vista does not share with non-affiliates so they can market to you.</i>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> ▪ <i>Mar Vista does not jointly market.</i>