

FACTS

WHAT DOES MORALIS TECHNOLOGIES, LLC d/b/a AQUINAS WEALTH ADVISORS 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 depend on the product or service you have with us. This information can include:

- Social Security number and income
- Account balances and assets
- Transaction history

When you are *no longer* our customer, we continue to share your information as described in this notice.

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 Moralis chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Moralis 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	Not Applicable
For our affiliates' everyday business purposes— information about your transactions and experiences	No	Not Applicable
For our affiliates' everyday business purposes— information about your creditworthiness	No	Not Applicable
For our affiliates to market to you	No	Not Applicable
For nonaffiliates to market to you	No	Not Applicable

Questions?

Call: (833) 730-3700

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650 Washington Rd.
Suite1000
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Who we are

Who is providing this notice?

Moralis Technologies, LLC (“Moralis”), doing business as Aquinas Wealth Advisors

What we do

How does Moralis 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 Moralis collect my personal information?

We collect your personal information, for example, when you

- Enter into an investment advisory contract
- Seek financial advice
- Open an account
- Complete transactions in your account, including deposits, withdrawals, or transfers
- Tell us about your investment or retirement portfolio

We also collect your personal information from other companies.

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 nonaffiliates 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.

- *Moralis does not have any affiliates*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Moralis does not share with nonaffiliates so that they can market to you*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *MFA does not jointly market*

Other important information

For California Residents: Moralis will not share information we collect about you with nonaffiliates third parties, except as permitted by California law, such as to process your transaction or maintain your account.

To protect yourself, we strongly recommend that you do not provide your account information, username or password with anyone. If you notice or become aware of any suspicious activity or transaction, it is your responsibility to notify us immediately.