

FACTS

WHAT DOES MERCER 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ▪ Social Security number and income ▪ Investment experience and risk tolerance ▪ Account balances and transaction history <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 Mercer Advisors chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Mercer Advisors 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 don't share
For our affiliates' everyday business purposes —information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes —information about your creditworthiness	No	We don't share
For our affiliates to market to you	No	We don't share
For nonaffiliates to market to you	No	We don't share
Questions?	Call 888.265.0274	

Who we are	
Who is providing this notice?	Mercer Global Advisors, Inc.
What we do	
How does Mercer Advisors protect my personal information?	<p>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.</p> <p>Mercer Advisors maintains physical, electronic, and procedural safeguards to protect nonpublic personal information.</p>
How does Mercer Advisors collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ▪ open an account ▪ give us your contact information ▪ enter into an investment advisory contract ▪ seek advice about your investments ▪ tell us about your investment or retirement portfolio <p>We also collect your personal information from others, such as credit bureaus, affiliates, 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 nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.</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>Our affiliates include financial companies such as Mercer Advisors Insurance Services, LLC; MAPAM GP I, LLC; Mercer Private Asset Management; and Heim Young & Associates, Inc.</i>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Mercer Advisors does not share with nonaffiliates 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>Mercer Advisors doesn't jointly market.</i>
Other important information	

California residents:

The California Consumer Privacy Act (CCPA) gives California residents certain privacy rights related to their personal information. For more information, please review our California Consumer Privacy Policy on our website by selecting the Privacy & Security link in the footer.

Nevada residents:

Under Nevada law, you may request, in writing, to be placed on our internal "Do Not Call" list. Nevada law requires that we also provide you with the following contact information: Bureau of Consumer Protection, Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101. Phone: (702) 486-3132. Email: BCPINFO@ag.state.nv.us.

Oregon residents:

We will not share your personal information or browsing information with nonaffiliated third parties for marketing purposes, except after you have been informed by us about such sharing and had an opportunity to indicate that you do not want a disclosure made for marketing purposes.

Vermont residents:

We will not disclose information about your creditworthiness to our affiliates and will not disclose your personal information, financial information, credit report, or health information to nonaffiliated third parties to market to you, other than as permitted by Vermont law, unless you authorize us to make those disclosures.