



WESTON FINANCIAL

A Division of Washington Trust Wealth Management

FACTS

WHAT DOES WESTON FINANCIAL GROUP, INC. 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 Employment information
- Account Balances and Account transactions
- Income and Investment experience

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 Weston Financial Group, Inc. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Weston Financial 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	No	We don't share
For our affiliates' everyday business purposes—information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

Questions?

Call 781-235-7055 or go to www.westonfinancial.net

Who we are

Who is providing this notice?

Weston Financial Group, Inc., Weston Securities Corporation, New Century Portfolios and The Park Insurance Agency, Inc.

What we do

How does Weston Financial 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.

These physical, electronic & procedural safeguards were created to protect your information. We also limit employee access as appropriate.

How does Weston Financial collect my personal information?

We collect your personal information, for example, when you

- Open an account or Provide account information
- Seek financial or tax advice or Seek advice about your investments
- Enter into an investment advisory contract

We also collect your personal information from others, such as credit bureaus, affiliates, or 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. See below for more on your rights under state law.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *Our affiliates include The Washington Trust Company and Washington Trust Bancorp, Inc.*

Nonaffiliates

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

- *Weston Financial does not share with nonaffiliates so they can market to you.*

Joint marketing

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

- *Weston Financial doesn't jointly market.*

Other important information

For Massachusetts Customers. Weston Financial will not share personal information from deposit or share relationships with nonaffiliates either for them to market to you or for joint marketing - without your authorization.