

Client Privacy Policy

FACTS	What does Atria Investments, Inc. (“Adhesion Wealth”) 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 products or services you have with us. This information can include: <ul style="list-style-type: none"> • Social Security number • Transaction history and transaction or loss history • Investment experience • Assets and account transactions 	
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 we choose to share; and whether you can limit this sharing.	
	Reasons we can share your personal information	Do we share?
	For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations	Yes
	For our marketing purposes— to offer our products and services to you.	No
	For joint marketing with other financial companies.	No
	For our affiliates’ everyday business purposes — information about your transactions and experiences.	We don’t share
	For our affiliates’ everyday business purposes— information about your creditworthiness.	No
	For our affiliates to market to you.	We don’t share
	For nonaffiliates to market to you -	No
	Can you limit this sharing?	
		No
		We don’t share
		We don’t share
		We don’t share
Questions?	Call us at 888-295-8351 (toll free).	

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Who We Are	
Who is providing this notice?	Atria Investments, Inc. (d/b/a Adhesion Wealth)
What We Do	
How does Adhesion 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 physical, electronic and procedural safeguards.
How does Adhesion collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Make deposits or withdrawals from your account • Enter into an investment advisory contract • Tell us about your investment or retirement earnings • Tell us about your investment or retirement portfolio • Order a commodity futures or option trade <p>We also collect your personal information from 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. Please see the "Other Important Information" below.</p>
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> • <i>AssetMark, Inc.</i> • <i>AssetMark Trust Company</i> • <i>AssetMark Services, Inc.</i> • <i>AssetMark Brokerage, LLC</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>Adhesion does not share with nonaffiliates so they can market to you.</i>
Joint Marketing	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • <i>Adhesion does not jointly market.</i>
Other Important Information	
N/A	