

NOTICE REGARDING TREATMENT OF CONFIDENTIAL INFORMATION

Buttonwood Partners, Inc. has always respected the privacy of our clients and is committed to treating your personal information responsibly. This notice describes our privacy policy and how we treat the personal information we request from you.

Why We Collect and How We Use Information.

We are required by current regulation to ask you for certain personal information before we open an account or provide investment services for you. This information is used to verify your identity and determine that your investments match your financial goals and personal situation. Buttonwood Partners, Inc. does not hold any assets and is required by current regulations to share your personal information with our affiliates to the extent such information is necessary to process your transactions or maintain your account.

We do not sell your personal information to anyone.

What Information We Collect.

The personal information we collect may include:

- ❖ Name and address
- ❖ Social Security or Taxpayer Identification Number
- ❖ Assets and Income
- ❖ Investment experience
- ❖ Accounts at other financial institutions; and
- ❖ Any other pertinent information necessary to evaluate the suitability of an investment for you



How We Protect Your Information.

We restrict the collection and use of personal information to that which is necessary for providing client services, for business administration, and for regulatory compliance.

Buttonwood Partners, Inc. limits access to your information to employees and third parties who need to know that information to provide services for you.

At your request, we may disclose information to attorneys, accountants, lawyers, securities professionals, and others to assist us, or them, in providing services to you. We may make additional disclosures as permitted by law.

We also maintain physical, electronic, and procedural safeguards to protect information. Employees are required to comply with our established information confidentiality procedures.

Establish a Trusted Contact

Establish written consent for your BPI professional to discuss your account with family members or tax professionals should the need arise.

Access to And Correction of Information.

Your personal information is generally available for your review on request. If your personal information with us becomes inaccurate, or if you need to make a change to that information, please contact us at the number shown below so we can update our records. Some changes may require a written request.

Destruction

All forms and statements that contain confidential client information that are no longer needed for informational purposes or for complying with retention requirements are destroyed using a bonded outside vendor.

Further Information.

We hope that this Privacy Notice helps you to understand the steps Buttonwood Partners has taken to safeguard our clients' personal information. For additional information regarding our privacy policy, please write to

Buttonwood Partners, Inc. Attn: Compliance Officer,
at 701 Deming Way Suite 100, Madison, Wisconsin 53717,
or
Feel free to call (608) 827-6400 or toll free 800-279-1776.

SIPC

If you would like to obtain information regarding Securities Investor Protection Corporation and the coverage they provide, you may visit their web site at www.sipc.org or reach them by telephone at (202) 371-8300.

To learn more of what Buttonwood Partners, Inc. has to offer, please visit our website at www.buttonwoodpartnersinc.com