CUSTOS FAMILY OFFICE
AUSTIN · DENVER

PRIVACY POLICY NOTICE

FACTS	WHAT DOES CUSTOS FAMILY OFFICE, LLC 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 depends on the product or service you have with us. This information can include, but is not limited to:

- Social Security number and income;
- Assets and transaction history; and
- Investment experience and risk tolerance.

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

How?

All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons Custos Family Office, LLC chooses to share and whether you can limit this sharing.

Reasons we can share your personal information	Does Custos Family Office, LLC Share?	Can you limit this sharing?
For our everyday business purposes– This includes sharing with service providers who perform services on our behalf, such as account custodians, technology providers, and compliance consultants.	YES	NO
For our marketing purposes– to offer our products and services to you	YES	YES
For joint marketing with other financial companies	NO	We do not share
For text messaging purposes – To schedule meetings or appointment reminders	YES	YES
For our affiliates' everyday business purposes– information about your transactions and experiences	NO	We do not share
For our affiliates to market to you	NO	We do not share
For non-affiliates to market to you	NO	We do not share
For third-party access	NO	We do not share

To limit our sharing	**Please note:** This notice is provided at the time we establish our advisory relationship. For new clients, if you wish to limit permissible sharing, you may contact us within 30 days of receiving this notice. We will not share your information for purposes you can limit until 30 days after providing this notice.
Questions?	Call 303-578-7024

Who we are	
Who is providing this notice?	Custos Family Office, LLC. We provide this privacy notice annually and when we make material changes to our privacy practices.

SMS Privacy Policy	
Custos Family Office, LLC values your privacy. By subscribing to our SMS notification service, you agree to this privacy policy.	
Data Collection	■ We collect your phone number and name for SMS mobile messaging through the execution of the Investment Advisory Agreement and new account paperwork.
Data Usage	■ Your data is used solely for sending SMS messages This includes SMS messages for appointment scheduling or appointment reminders.
Data Security	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. ▪ We take reasonable steps to ensure the confidentiality of client information shared via text messages. However, clients are reminded to avoid including sensitive personal or financial information, such as account numbers or Social Security numbers, in text messages. ▪ We do not share any individual's consent to receive SMS from Custos Family Office, LLC with third parties. We do not share phone numbers for SMS purposes or affiliate marketing.
Data Retention	■ We retain your contact data for the duration of your enrollment. You may request deletion at any time.
Opt Out	■ Reply STOP to any message to unsubscribe.
Non-Sharing Clause	■ We do not share your information with third parties for marketing purposes. Your information is only shared with our SMS provider for secure messaging.

What we do	
How does Custos Family Office, LLC 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 Custos Family Office, LLC collect my personal information?	We collect your personal information, for example, when you ■ open an account or give us contact information ■ enter into an investment adviser contract or give us your income information ■ tell us about your investment or retirement portfolio We also collect your personal information from other companies. To ensure compliance and protect client information, all text message communications are conducted using firm-approved, secure communication platforms that are monitored and archived in accordance with regulatory requirements.
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 non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

Definitions & Terms	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ■ ***No mobile information including Personally Identifiable Information (PII) or SMS consent will be shared with third parties/affiliates for marketing/promotional purposes.***
Non-Affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■ ***No mobile information including Personally Identifiable Information (PII) or SMS consent will be shared with third parties/non-affiliates for marketing/promotional purposes.***
Third-Party Access	Non-affiliated companies are third-party entities that are not under common ownership or control with Custos Family Office and do not share a corporate relationship. In the context of SMS communications, these companies may include SMS gateway providers, mobile carriers, third-party messaging platforms, and vendors that support multi-factor authentication (MFA). While these entities may transmit, process, or store SMS messages on behalf of the adviser, they operate independently and are not affiliated with the RIA. ■ ***We do not share your information with third parties for marketing purposes. Your information is only shared with our SMS provider for secure messaging.***
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ ***No mobile information including Personally Identifiable Information (PII) or SMS consent will be shared for joint marketing/promotional purposes.***

Other Important Information

By signing Custos Family Office, LLC Agreement, I acknowledge that I have fully read and understand this Privacy Policy and opt-in as outlined above. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with my financial professional.

We retain client information for at least six years following account closure as required by SEC recordkeeping rules (Rule 204-2). After the required retention period, client information is securely destroyed in accordance with our information disposal procedures.

Residents of certain states may have additional privacy rights, including the right to access, delete, or correct personal information, and the right to opt-out of sales of personal information. For information about state-specific rights, please contact us at 303-578-7024.

SMS **Terms of Service**

By opting into SMS through Archive Intel, you are agreeing to receive SMS messages from Custos Family Office, LLC. This includes SMS messages for appointment scheduling or appointment reminders. Message frequency varies. Message and data rates may apply. See privacy policy https://custosfo.com/. Message HELP for help. Reply STOP to any message to opt out. We reserve the right to revise this policy from time to time without prior notice. You will be notified of any material changes in Our Privacy Policy either by email or by a conspicuous posting on our website: https://custosfo.com/