# Brite Investments USA, LLC

(Formerly known as Touchstone Advisory, LLC)

# Privacy Policy

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**What does Brite Investments USA, do with your personal information?**

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.

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
- Income and employment information
- Assets
- Account balances and transaction history
- Investment experience
- National Insurance Number

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 Brite Investments chooses to share; and whether you can limit this sharing.

**Reasons we can share your personal information:**

For our everyday business purposes – such as to process your transactions, maintain your accounts(s) or respond to court orders and legal investigations.

- For our marketing purposes – to offer our products and services to you. You can limit sharing.
- For joint marketing with other financial companies. You can limit sharing.
- For our affiliates' everyday business purposes – information about your transactions and experiences
- For our affiliates' everyday business purposes – information about your creditworthiness. We do not share this information.
- For our affiliates to market to you. You can limit sharing.
- For non-affiliates to market to you. We do not share this information.

If you have a question please contact: Tel: +1 (917) 810-3142 Mobile or email bennett@touchstone-us.com

**Who is providing this notice?**

Brite Investments USA, LLC

**How does Brite Investments USA protect my personal information?**

We collect your personal information, for example, when you

- Enter into an investment advisory contract
- Give us your employment history
- Give us your income information
- Tell us about your investment or retirement portfolio
- Seek financial advice

We also collect your personal information from others, such as 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 non-affiliates to market to you

State law and individual companies may give you additional rights to limit sharing.

See below for more on your rights under state law.

**What happens when I limit sharing for an account I hold jointly with someone?**

Your choices will apply to everyone on your account – unless you tell us otherwise.

**Definitions**

*Affiliates:* Companies related by common ownership or control. They can be financial and nonfinancial companies. Brite Advisors USA, Inc. and Brite Advisors Ltd. (UK) are affiliates.

*Non-affiliates:* Companies not related by common ownership or control. They can be financial and nonfinancial companies. Brite Investments does not share with non-affiliates so they can market to you.

*Joint marketing:* A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Brite Investments does not jointly market.

**Other important information**

*For California residents*

In accordance with California law, we will not share information we collect about you with nonaffiliates, except as allowed by law. For example, we may share information with your consent or to service your accounts. Among our affiliates, we will limit information sharing to the extent required by California law.