

At Shoreline Equity Partners, LLC (collectively, with its subsidiaries and affiliates, “Shoreline,” “us,” “our” or “we”) we are committed to respecting and protecting your privacy. We comply with the data privacy laws that are applicable to us (including the General Data Protection Regulation of the European Union). In the course of our business activities we may come into possession of your personal data. Shoreline controls the collection and processing of this personal data. In this policy we set out the principles governing our use of personal information that we may obtain about you.

If you have any questions or comments in connection with this policy, please contact us at Shoreline Equity Partners, LLC, 135 Professional Drive, Suite 104, Ponte Vedra Beach, FL 32082, tel. (904) 222-6540 or compliance@shorelineequitypartners.com.

Personal Data that We Collect

"Personal data" is any information that relates to you and that identifies you either directly from that information or indirectly, by reference to other information that we have access to. The categories of personal data that we may collect include:

- Contact information such as name, email address, telephone numbers, and business and private addresses;
- Information about your business relationship with Shoreline;
- Information about your business relationships with other parties (including, without limitation, certain of your investment transactions and holdings);
- Biographical information such as your professional role, employer, background, and interests;
- Marketing, communication preferences and related information;
- Feedback and survey responses; and
- Financial information such as social security number, income, assets, billing address, bank account, wire transfer instructions, transaction history and other payment information.

How We Collect Personal Data from You

We may collect personal data directly from you in the following ways:

- When you provide us your business card or contact information through our website, in person, or via email;

- When you register to attend one of our events;
- When you use our website or one of our online services we may collect information about your visit and how you interact with our website;
- When you provide us information in order to apply for a job with us;
- When you enter into an investment advisory contract;
- When you seek financial advice;
- When you make deposits or withdrawals from your account;
- When you tell us about your investment or retirement portfolio;
- When you give us your employment history;
- When you provide us with information necessary to identify you and complete security checks when you visit our offices.

We may supplement this information from other sources, including:

- Publicly available sources of information;
- Regulatory bodies;
- Credit agencies;
- Third parties providing services to us.

We may combine personal data that you provide to us with other sources in some circumstances.

How We Use Your Personal Data

We will only use your personal data where we have a lawful reason to do so. Unless otherwise indicated, you should assume that we process your personal data for business, Shoreline (and not third-party) marketing, and/or regulatory and compliance purposes, including to provide services to you, to fulfill a contract with you or when we have a legal or regulatory duty with which to comply.

We will retain your personal data for as long as necessary to fulfill the purpose for which we collected it, to comply with legal, regulatory or reporting obligations, to assert or defend against legal claims, or as applicable laws and business best practices allow.

How We Protect Your Personal Data

We maintain physical and procedural safeguards to protect personal data against unauthorized or unlawful processing and against accidental loss, destruction, or damage.

Who We Share Your Personal Data With

We do not disclose personal data to anyone except as described below or otherwise permitted by law. This may include:

- Disclosing personal data to service providers;
- Disclosing personal data when necessary to law enforcement, and governmental, regulatory and self-regulatory authorities; and
- Disclosing personal data to third parties when you have consented to our doing so.

European Union Residents

Under the General Data Protection Regulation of the European Union, a resident of the European Union may have certain rights, including:

- the right to direct us not to disclose nonpublic personal information to a nonaffiliated third party;
- the right to access his/her personal data;
- the right to restrict the use of his/her personal data;
- the right to have incomplete or inaccurate data corrected;
- the right to ask us to stop processing his/her personal data;
- the right to request for us to "port" his/her personal data in a portable, re-usable format to other organizations, where applicable and possible; and
- the right to require us to delete his/her personal data in some limited circumstances.

If you are a resident of the European Union and would like to exercise any of these rights, you must provide a written statement exercising that right. However, some of the personal data we collect may be necessary for us to provide requested services to you and if you do not wish to provide it, it will affect our ability to provide such services to you. In addition, in the event we encounter circumstances where we are compelled by law, rule or regulation or another applicable requirement to retain or disclose your personal data, we will do so even if you have exercised your right to opt out.

You have the right to object to our use of your personal data for direct marketing purposes at any time by contacting us in writing as described above.