

Effective August 2024

FACTS

WHAT DOES DREXEL MORGAN 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 product or service you have with us. This information can include:

- Social Security Number and Income
- Account Balances and Transaction History
- Assets and Employment History

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 client information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons Drexel Morgan chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Drexel Morgan share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes –	No	We do not share
For joint marketing with other financial companies –	No	We do not share
For our affiliates' everyday business purposes – information about your transactions and experiences.	No	We do not share
For our affiliates' everyday business purposes – information about your creditworthiness.	No	We do not share
For non-affiliates to market to you –	No	We do not share

Questions?

Please call 484-254-4306 or go to www.DrexelMorgan.com

Who we are

Who is providing this notice?

- Drexel Morgan & Co.

What we do

How does Drexel Morgan 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 Drexel Morgan collect my personal information?

We collect your personal information, for example, when you:

- Seek advice about your investments
- enter into an investment advisory contract
- provide account information or direct us to buy securities

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 individuals companies may give you additional rights to limit sharing.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial.

Our affiliates include financial companies such as The Haverford Trust Company, Haverford Trust Securities, and Haverford Financial Services.

Non-affiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

Drexel Morgan does not share information with non-affiliates so they can market to you.

Joint Marketing

A formal agreement between non-affiliated financial companies that together market financial products or services to you.

Drexel Morgan does not jointly market with non-affiliated companies.