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Privacy Notice

Rev. 30.09.2026

FACTS	WHAT DOES KAISER PARTNER FINANCIAL ADVISORS Ltd. 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: ▪ Information we receive from you on applications or other forms (E.g. social security number, information regarding your family and income). ▪ Information about your transactions with us, our affiliates, or others ▪ Account/asset balances
How?	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 Kaiser Partner Financial Advisors Ltd. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Kaiser Partner Financial Advisors Ltd. 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— to offer our products and services to you	**Yes**	**No**
For joint marketing with other financial companies	**No**	**We don't share**
For our affiliates' everyday business purposes— information about your transactions and experiences	**Yes**	**No**
For our affiliates' everyday business purposes— information about your creditworthiness	**No**	**We don't share**
For our affiliates to market to you	**No**	**We don't share**
For nonaffiliates to market to you	**No**	**We don't share**

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To limit our sharing	▪ Call +41 44 752 51 52 – our menu will prompt you through your choice(s) ▪ Visit us online: https://kaiserpartner.financial/ or ▪ Mail the **form** below **Please note:** If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	Call 41 44 752 51 52 or go to https://kaiserpartner.financial/

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Mail in Form			
Leave Blank OR **If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.** ☐ **Apply my choices only to me**	**Mark any/all you want to limit**		
	☐	Do not share information about my creditworthiness with your affiliates for their everyday business purposes.	
	☐	Do not allow your affiliates to use my personal information to market to me.	
	☐	Do not share my personal information with nonaffiliates to market their products and services to me.	
	Name		**Mail to:** Kaiser Partner Financial Advisors Ltd. Freigutstrasse 16 8002 Zürich
	Address		
	City, State, Zip		
	Account no.		

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Who we are	
Who is providing this notice	Kaiser Partner Financial Advisors Ltd.
What we do	
How does Kaiser Partner Financial Advisors Ltd. 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. We restrict access to non-public personal information about you to those employees who need to know that information in order to provide financial products or services to you.
How does Kaiser Partner Financial Advisors Ltd. collect my personal information?	We collect your personal information, for example, when you ▪ Open an account or deposit money ▪ Pay your bills or apply for a loan ▪ Direct us to buy or sell securities We also collect your personal information from others, such as affiliates, your custodians and 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 nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing
What happens when I limit sharing for an account, I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Other important information
From time to time, we may change the policies and procedures provided in this Privacy Notice, due to changes in the law, or changes in our operations, and we will notify you of these changes as required by law.