

FACTS	WHAT DOES CHESLEY, TAFT & ASSOCIATES, LLC (“CHESLEY TAFT”) 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?	<p>The types of personal information we collect and share depend on the product or service you have with us. The information can include:</p> <ul style="list-style-type: none"> • Information we receive from you to open an account or provide investment advice to you (such as your name, social security number, home address, telephone number, and financial information). • Information that we generate to service your account (such as trade tickets and account statements); and • Information that we may receive from third parties with respect to your account (such as trade confirmations from brokerage firms). 	
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 customers' personal information, the reasons Chesley, Taft & Associates chooses to share, and whether you can limit this sharing.	
Reasons we can share your personal information	Does Chesley Taft 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 regulatory reasons.	Yes	No
For our marketing purposes – to offer our products and services to you.	No	We do not share
For joint marketing with other financial companies	No	We do not share
For affiliates' everyday business purposes – information about your transactions and experiences.	No	We do not share
For affiliates' everyday business purposes – information about your creditworthiness.	No	We do not share
For affiliates to market to you	No	We do not share
For non-affiliates to market to you Chesley Taft will not sell your personal information to anyone.	No	We do not share

To limit our sharing	Call 312-873-1260 Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at anytime to limit our sharing.
Questions	Call 312-873-1260 or visit www.chesleytaft.com
Who we are	
Who is providing this notice?	Chesley, Taft & Associates, LLC
What we do	
How does Chesley Taft 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 administrative, technical, and physical safeguards, including computer safeguards and secured files and buildings.
How does Chesley Taft collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> • Enter into a client advisory agreement • Open an account • Tell us about your investment or retirement portfolio • Provide your employment information • Show your driver’s license information
Why can’t I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> • Sharing for affiliates’ everyday business purposes – information about your creditworthiness • Affiliates 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.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply individually unless you tell us otherwise.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial or nonfinancial companies. Chesley Taft does not have any affiliates.
Non-affiliates	Companies not related by common ownership or control. They can be financial or nonfinancial companies. Other than as disclosed above regarding everyday business purposes, Chesley Taft does not share information with non-affiliates.
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. Chesley Taft does not conduct joint marketing.
Other Important Information	
Portfolio Manager Departure	<p>Unless you opt out, if a portfolio manager leaves Chesley Taft to join another investment management firm, the portfolio manager may retain, and share with the portfolio manager's new firm, certain client information relating to clients personally serviced by such portfolio manager in order to allow the portfolio manager to present the client with the option to be serviced by the portfolio manager at the portfolio manager's new firm. This information is limited to a client's name, a general description of the type of account and products held by the client, and the client's contact information, including the client's address, telephone number, and email information, it does not include any client's account number, Social Security number, or securities positions.</p> <p>If you do not want your portfolio manager to be able to use your information in this way, please contact Laura Flentye at l.flentye@chesleytaft.com.</p>