



<b>FACTS</b>	<b>WHAT DOES LYTLE INVESTMENTS DO WITH YOUR PERSONAL INFORMATION?</b>
<b>WHY?</b>	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.
<b>WHAT?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social Security number or other tax identification number</li> <li>• Account balances and transaction history</li> <li>• Income, employment information and risk tolerance</li> </ul>
<b>HOW?</b>	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 Lytle Investments chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Lytle share?	Can you limit this sharing?
<b>For our everyday business purposes -</b> such as to process your transactions, maintain your account(s), or to respond to court orders and legal investigations	Yes	No
<b>For our marketing purposes -</b> To offer our products and services to you	No	We don't share
<b>For joint marketing with other financial companies</b>	No	We don't share
<b>For our affiliates' everyday business purposes -</b> Information about your transactions and experience	Yes	No
<b>For our affiliates' everyday business purposes -</b> Information about your creditworthiness	No	We don't share
<b>For nonaffiliates to market to you</b>	No	We don't share

<b>Questions?</b>	Call 877-425-4463 or in writing to Lytle Investments, Attn: Marie Zaczek, 101 Lang Boulevard, Grand Island, NY 14072
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## Who we are

**Who is providing this notice:** Lytle Investments

## What we do

**How does Lytle Investments 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.

Employees are trained on the proper handling of customer personal information.

**How does Lytle Investments collect my personal information?**

We collect your personal information, for example, when you

- Open an account;
- Seek advice about your investments;
- Provide account information; or
- Make deposits or withdrawals from your account.

**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.

## Definitions

**Affiliates**

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

- Our affiliates are Lytle Associates and Aebly & Associates

**Nonaffiliates**

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

- Lytle Investments does not share with nonaffiliates so they can market to you.
- We share your information with other financial service firms to service your account. These non-affiliates include Osaic Wealth, Inc. (our broker-dealer), Charles Schwab & Co., AssetMark, Riskalyze and eMoney who have separate privacy policies, none of whom share your personal data for marketing purposes.

**Joint Marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- Lytle Investments does not have joint marketing arrangements.