



# North American Management

<b>FACTS</b>	WHAT DOES NORTH AMERICAN MANAGEMENT CORP. (NAM) DO WITH YOUR PERSONAL INFORMATION?
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<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.
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<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: Social security numbers, addresses, bank account numbers, brokerage account numbers, and account market values.
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<b>HOW?</b>	All financial companies need to share some personal information to run their everyday business. Below we list reasons why we would share your information and whether you can limit this sharing.
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Reasons we can share your personal information	Does NAM share?	Can you limit sharing?
<b>Everyday business purposes such as –</b> process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
<b>For our marketing purposes to –</b> offer products and services to you	YES	YES
<b>For joint marketing with other financial companies</b>	NO	N/A
<b>For our affiliates everyday business purposes –</b> information about your transactions and experiences	YES	NO
<b>For our affiliates everyday business purposes –</b> information about your creditworthiness	NO	N/A
<b>For our affiliates to market to you</b>	NO	N/A
<b>For non-affiliates to market to you</b>	NO	N/A

<b>QUESTIONS?</b>	Call 617-695-2100 or email <a href="mailto:bstuart@namcorp.com">bstuart@namcorp.com</a>
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<b>Who we are</b>	
<b>Who is providing this notice?</b>	NORTH AMERICAN MANAGEMENT CORP (NAM)

<b>What we do</b>	
<b>How does NAM protect my personal information?</b>	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.
<b>How does NAM collect my personal information?</b>	We collect your personal information, for example, when you: <ul style="list-style-type: none"> <li>• Open an account</li> <li>• Request a wire or payment</li> </ul>
<b>Why can't I limit all sharing?</b>	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• the affiliates from using your information to market to you</li> <li>• sharing for nonaffiliates to market to you</li> </ul>
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone listed on your account.

<b>Definitions</b>	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies.
<b>Non-affiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
<b>Joint Marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.