

PRIVACY NOTICE

FACTS	WHAT DOES POLEN CAPITAL MANAGEMENT, LLC (“Polen Capital”) 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. This information can include:</p> <ul style="list-style-type: none"> ▪ Social security number and income ▪ Name and address ▪ Employment information ▪ Financial and investment qualifications and objections ▪ Wire transfer instructions ▪ Account transaction history <p>When you are <i>no longer</i> our customer, we continue to share information about you as described in this notice.</p>	
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 Polen Capital chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Polen Capital Share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your accounts(s) or respond to court orders and legal investigations.	Yes	No
For our marketing purposes - to offer our products and services to you	No	We don’t share
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' everyday business purposes - information about your transactions and experiences	Yes	No
For nonaffiliates to market to you	No	We don’t share
Questions?	Call Brian Goldberg at 561-241-2425 OR Visit: http://www.polencapital.com/	

Who we are	
Who is providing this notice?	Polen Capital
What we do	
How does Polen Capital 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 Polen Capital collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ▪ Complete account documentation ▪ Complete questionnaires ▪ Provide information directly ▪ Provide information via a fiduciary or other person acting on behalf of yourself ▪ Give us your employment history
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> ▪ 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 <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Polen Capital does not have any affiliates.</i>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ▪ <i>Polen Capital does not share with nonaffiliates so they can market to you. Polen Capital does share with nonaffiliates information about your transactions and experiences.</i>
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> ▪ <i>Polen Capital does not use your information to jointly market.</i>