

FACTS

WHAT DOES SOUTHSTATE PRIVATE CAPITAL MANAGEMENT LLC 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:

- Social Security number and income;
- Account balances and transaction history;
- Employment information and credit history.

When you are no longer our customer, we continue to share your information as described in this notice.

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 SouthState Private Capital Management chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does SouthState Private Capital Management 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	YES	NO
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

Questions?

Call [303-370-0055](tel:303-370-0055) or visit us at www.pcm-inc.com

Who we are

Who is providing this notice?

SouthState Private Capital Management LLC is a wholly owned subsidiary of SouthState Bank, National Association.

What we do

How does Private Capital Management 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 Private Capital Management 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
- use your credit or debit card

We also collect your personal information from others, such as credit bureaus, affiliates, or 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.

Definitions

Affiliates

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

- *Our affiliates include a bank (SouthState Bank, National Association), a registered broker dealer (SouthState Securities Corp.), and a registered investment advisor (SouthState Private Capital Management LLC).*

Nonaffiliates

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

- *SouthState Private Capital Management does not share with nonaffiliates so they can market to you.*

Joint Marketing

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

- *Our joint marketing partners may include other financial service companies.*

Other Important Information

In addition to federal law, you may be protected by specific state or local regulations concerning information sharing and marketing. SouthState Private Capital Management LLC will comply with these regulations, as applicable.

For California Residents please refer to our California Consumer Privacy Notice posted on our website for information on your rights under the California Consumer Privacy Act. <https://www.southstatebank.com/global/privacy-notice/california-consumer-privacy-notice>