PRIVACY NOTICE

Safeguarding Your Privacy

We at Gibson Capital, LLC consider it a privilege to serve as your investment advisor. At the core of our relationship is trust. You have entrusted us with privileged personal and financial information, as well as the management of your investments. This notice outlines our commitment to safeguarding the privacy of our relationship.

The types of private information we collect

Understanding your personal financial situation and goals is the cornerstone of our ability to develop an appropriate investment strategy for you. Therefore, we gather and update certain private information about you and other relevant parties, such as family members, throughout the life of our relationship. The types of information we may collect include:

- Name, address, and tax identification number
- Income, assets, liabilities, and net worth
- Financial goals, estate plans, trust documents, and documents evidencing fiduciary responsibility
- Tax planning information
- Your transaction history with us

We may gather this information in the following ways:

- From you through applications, forms, and telephone or in-person interviews
- From your associated persons such as accountants, attorneys or other advisors, as directed by you
- From other records and statements provided by you
- From other parties involved in our advisory relationship such as your custodian, bank, and/or broker/dealer

How we use your personal information

Gibson Capital, LLC gathers this privileged information solely for the purpose of providing you with appropriate investment advisory services throughout our relationship. We do not sell or otherwise disclose private client information to any third parties for marketing other products or services to you.

We do share and coordinate limited information, however, with certain nonaffiliated third parties essential to our investment advisory relationship. Third parties would include companies that provide services necessary to effect your investment transactions, such as custodians, banks, broker-dealers, or other third parties as necessary to carry out the services under our client agreement.

We may also, as specifically directed by you, share your account and transaction information with designated third parties, such as your accountant, attorney, or other advisors.

Gibson Capital, LLC does not publish or otherwise make available a list of our clients. On occasion, and only with your specific consent, we may provide your name and contact information only to a prospective client for purposes of providing a reference. No client is obligated to serve as a reference in this manner.

Regulators, government agencies, courts, or parties to lawsuits may request information about you and your transactions from us as permitted by law. In such cases, we share only the information that we are required or authorized to share.

We afford prospective and former clients the same protections as existing clients with respect to the use of personal information.

Confidentiality, security, and integrity

We employ appropriate measures to protect your personal information and require staff who have access to this information to follow standards of security and confidentiality. We maintain physical, electronic, and procedural safeguards to ensure the integrity of your personal information.

Our concern for your privacy extends to our website as well. Clients accessing their account information online are doing so on a secure site utilizing data encryption and user names and passwords.

For further clarification

If you have any questions regarding this notice, or would like to discuss ways to further restrict our use of your personal information, please call us at 724.934.3200. Your comfort is our priority.

We will update and provide to our clients at least annually our policy regarding privacy and the use of personal information.