

FACTS**What Does Mason Investment Advisory Services 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 or other tax identification number and income • account balances, transaction history, and investment experience • addresses and contact information 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 clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons Mason chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Mason 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	No	We do not 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 do not share
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share
To limit our sharing	You may request that Mason not provide this occasional information by emailing your request to compliance@masoncompanies.com , or mailing your request to the attention of Jack Delaney, Mason Investment Advisory Services, Inc., 11921 Freedom Drive, Suite 1000, Reston, VA 20190.	

Questions? Call Jack Delaney, Chief Compliance Officer at (703) 716-6000

Who we are	
Who is providing this notice?	Mason Investment Advisory Services, Inc.
What we do	
How does Mason 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 Mason collect my personal information?	We collect your personal information, for example, when you • enter into an investment advisory contract • tell us about your investment or retirement portfolio • give us your income information • provide account information • give us your contact information We may also collect your personal information from other companies, such your third-party custodian.
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.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • <i>Mason Associates, Inc.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <i>Mason does not share with nonaffiliates so they can market to you.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <i>Mason does not do joint marketing.</i>