



Crescent Capital Consulting, LLC Privacy Policy

Amendments to 17 CFR Part 248 of Regulation S-P require every investment adviser registered with the SEC to develop, implement, and maintain a Privacy Policy statement to be delivered annually to its clients. We have adopted the model form as published in the Federal Register, Volume 74, Number 229, December 2009.

May 1, 2020

SEC Number 801-71795
CRD Number 153925

1100 Poydras Street – Energy Centre Suite 1502
New Orleans, LA 70163

CONFIDENTIALITY AND PRIVACY POLICY

Crescent Capital Consulting, LLC takes the confidentiality of your personal information and the privacy of your account(s) very seriously. Our commitment to safeguard your personal information goes beyond our legal obligation to process your investment program accurately and securely. Whether we serve you in person, on the telephone, by mail, or online, the principles that guide the way in which we conduct business are built upon the core values of trust and integrity.

To protect your personal information and/or that of your organization from unauthorized access and use, we utilize security measures that include physical, electronic and procedural safeguards that comply with all applicable laws and regulations to protect your information. Amendments to Section 248.30 of Regulation S-P require every investment adviser registered with the SEC to develop, implement, and maintain a comprehensive information security program. The program must include written policies and procedures that provide administrative, technical, and physical safeguards for protecting personal information, and for responding to unauthorized access to or use of personal information. The program also must be appropriate to the size, complexity, nature and scope of the registrants' activities, and the sensitivity of any personal information at issue.

Crescent Capital Consulting, LLC adopted its Information Security Program on December 31, 2010 and a copy of this program is available upon request.

Like most financial services firms, Crescent Capital Consulting, in order to serve our clients better, needs to share non-public information in the normal everyday conduct of our business with companies not affiliated with us. We may share your personal information in order to establish accounts, process transactions, and offer our services to you. We do not sell information about our clients to third parties, we do not jointly market with financial companies, and we do not otherwise disclose information about you or your organization to third parties so they can market to you.

CONFLICTS OF INTEREST

Since our inception, it has been our policy to avoid any practice that is adverse in any respect to our clients' interests or is the result of a conflict of interest. While we strive to avoid conflicts, we are cognizant that conflicts will nevertheless arise, and it is our policy to fully and fairly disclose known material conflicts to you. Crescent Capital Consulting, LLC has adopted a written Code of Ethics as required by SEC Rule 204A-1 which explains our policies and procedures regarding potential conflicts of interest further. A copy of this document is available upon request.

FORM ADV – PART TWO

Crescent Capital Consulting, LLC is a Registered Investment Adviser under the Investment Advisers Act of 1940, as amended. We are required to provide annually clients with a copy of Part Two of Form ADV. We encourage you to read and maintain this document with your other documentation related to your relationship with Crescent Capital Consulting.

We hope that this explanation is helpful to you. If you have any questions concerning these or any other policies of the firm, please feel free to contact Sheridan Grace at 504-207-8555 or SGrace@CrescentCapitalConsulting.com at any time.

FACTS

WHAT DOES CRESCENT CAPITAL CONSULTING, 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.
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WHAT?	<p>The types of personal information we collect and share depend on the product or service you have engaged Crescent Capital Consulting, LLC to provide. This information can include:</p> <ul style="list-style-type: none"> ■ Tax Identification Number and/or Social Security Number ■ Account Numbers and Balances <p>When you are no longer our client, we continue to retain your information as required by law.</p>
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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 Crescent Capital Consulting chooses to share, and whether you can limit this sharing.
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Sharing your personal information:	Does Crescent Capital Consulting share?	Can you limit this sharing?
For everyday business purposes – <i>Information used to maintain your account(s), process your transactions, communicate with your money managers and fund managers, and respond to court orders and legal investigation, or report to regulatory institutions.</i>	Yes <i>But only with your custodian, money managers and fund managers or as otherwise required by law.</i>	No
For our marketing purposes – <i>Information about who our clients are.</i>	Yes <i>With prospective clients and other interested parties.</i>	Yes <i>We only include client information in our client list when given explicit approval from the client.</i>
For joint marketing purposes – <i>Information that could be utilized by other companies to market products and services directly to you.</i>	NA	NA

Questions?	Call 504-207-855. Or visit our website: www.CrescentCapitalConsulting.com
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WHO WE ARE

Who is providing this notice?	Crescent Capital Consulting, LLC
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WHAT WE DO

How does Crescent Capital Consulting protect my personal information?	<p>To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include:</p> <ul style="list-style-type: none"> ■ Computer safeguards such as secure passwords, file encryption, and firewalls. ■ Secured files and offices.
How does Crescent Capital Consulting collect my personal information?	We collect your personal information, for example, when you open an account with our firm.
Why can't I limit all sharing?	It would simply not be practical to limit sharing your personal information with custodians, fund managers, and money managers.

DEFINITIONS

Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. Crescent Capital Consulting, LLC has no affiliates at this time.
Custodian	Financial institution(s) selected and authorized by you to hold your securities and cash in custody. These can be banks or broker-dealers or fund administrators.
Fund Manager	The manager of a mutual fund, closed-end fund or exchange traded fund.
Joint Marketing	A formal or informal agreement between companies that market financial products or services to you. Crescent Capital Consulting, LLC has no such arrangements and does not envision engaging in such joint marketing in the future.
Non-Affiliates	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> ■ Schwab Advisor Services ■ TD Ameritrade
Money Manager	The investment manager or your separate or wrap-fee account that you have retained to manage your securities and cash.