

# FACTS

## WHAT DOES STRATEGY FINANCIAL GROUP 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 financial information
- Investment holdings and investment experience
- Financial goals and financial 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 Strategy Financial Group chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Strategy Financial Group share?	Can you limit this sharing?
<b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders, and comply with regulatory requirements.	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We don't share
<b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences	No	We don't share
<b>For our affiliates' everyday business purposes—</b> information about your creditworthiness	No	We don't share
<b>For nonaffiliates to market to you</b>	No	We don't share

### Questions?

Call (609) 343-9301 or email [info@strategyfinancialgroup.com](mailto:info@strategyfinancialgroup.com)

## Who we are

Who is providing this notice?

Strategy Financial Group

## What we do

How does Strategy Financial Group 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. We also restrict access to your personal information to those individuals who need to know the information to provide services and/or products to you.

How does Strategy Financial Group collect my personal information?

We collect your personal information, for example, when you

- Open an account with us or transfer assets to our management.
- Complete an insurance application for a product we recommend

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. See additional information below.

## Definitions

**Affiliates**

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

- Strategy Financial Services, LLC and Strategy Financial Insurance, LLC are affiliates doing business under the trade name Strategy Financial Group

**Nonaffiliates**

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

- Our nonaffiliated business partners Fidelity Institutional®, Charles Schwab & Co., Inc.®, Mulholland Wealth Advisors LLC, and AE Wealth Management, LLC

**Joint marketing**

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

- We have no such agreements

## Other important information

You may have privacy protections under applicable state laws. To the extent the state laws apply, we will comply with them when we share information about you, and in some case may be limited by you.