

ITEM 3: PRIVACY POLICY

FACTS

What does Weiser Financial Group LLC do with my 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
- Assets and investment experience
- Account transactions and risk tolerance, and
- Employment information

When you are *no longer* our client, 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 clients' personal information; the reasons Weiser Financial Group LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Weiser Financial Group LLC share?	Can you limit this sharing?
For our everyday business purposes	No	We do not share
For our marketing purposes	No	We do not share
For joint marketing with other financial companies	No	We do not share
For our affiliates' everyday business purposes — information about your transactions and experiences	No	We do not share
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 - Edelman Financial Engines	Yes	No

Questions?

Contact us through WeiserFinancialGroup.com or call (941) 363-1004

Who we are	
Who is providing this notice?	Weiser Financial Group LLC
What we do	
How does Weiser Financial Group LLC 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 computer safeguards and secured files and buildings, as well as:</p> <ul style="list-style-type: none"> • information access controls • service provider oversight and confidentiality agreements • proper disposal of client information • periodic security training for personnel
How does Weiser Financial Group LLC collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • open an account • submit a distribution request • enter into a Client Agreement or tell us about your investment or retirement portfolio or earnings
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes — information about your creditworthiness • affiliates from using your information to market to you • sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • <i>None</i>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • <i>Edelman Financial Engines</i>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • <i>Weiser Financial Group LLC doesn't jointly market.</i>