

Clear Financial Strategies Privacy Policy

FACTS What Does Clear Financial Strategies (CFS) Do With Your Personal Information?

THE LAW 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.

OUR POLICY The types of personal information we collect, and share depend on the product or service you have with us. This information can include:

- Income
- Employment and residential information
- Social security number
- Cash balance
- Security balances
- Transaction detail history
- Investment objectives, goals, and risk tolerance

OUR POLICY When you sign up for our SMS/Texting Services, we may collect the following:

- Phone Number: Required to send you SMS/text messages.
- Name: Optional but helps personalize our messages.
- Consent Records: To document your opt-in to our SMS/texting services.

OUR POLICY Children's Policy:

Our SMS/texting services are not intended for individuals under the age of 18. We do not knowingly collect personal information from minors. If we become aware that we have collected information from a minor, we will take steps to delete such information.

OUR POLICY When you are no longer our client, we continue to share your information as described in this notice.

YOUR RIGHTS All financial companies need to share client personal information to run their everyday business. We list below the reasons financial companies can share their clients' personal information; the reasons CFS chooses to share; and whether you can limit this sharing.

DEFINITIONS

Everyday Business Purposes	The actions necessary by financial companies to run their business and manage client accounts, such as providing investment advisory and financial planning advice, processing securities transactions, and otherwise providing financial services to you.
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. CFS has the following affiliate: <ul style="list-style-type: none">• Wealth Preservers, LLC
Non-Affiliates	Companies not related by common ownership or control. They can be financial or non-financial companies. CFS does not share information with non-affiliates for marketing purposes.
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. CFS does not engage in joint marketing with non-affiliates.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES CFS SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes – such as to provide advice, process your transactions, and maintain your account(s)	YES	NO
For our marketing purpose – to offer our products and services to you. You may opt-out of receiving SMS/text messages from us at any time by replying “STOP” to the most recent message you have received from us. Please note that if you opt-out of receiving promotional messages, we may still send you administrative messages.	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 affiliate’s everyday business purposes	No	We do not Share
For our affiliates to market to you	No	We do not share
For non-affiliates to market to you	No	We do not share

Sharing Practices	
How often does CFS notify me about their practices?	We must notify you about our sharing practices when you open an account and each year while you are a client.
How does CFS 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 CFS collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none"> • Establish an investment advisory relationship. • Contract for financial planning services. • Open an account or deposit money with custodians. • Purchase of sell securities with executing broker-dealers. <p>We also collect your personal information from others, such as custodians, broker-dealers, or other companies.</p>
Why can’t I limit all sharing?	<p>Federal law gives you the right to limit sharing only for:</p> <ul style="list-style-type: none"> • Affiliates’ everyday business purposes – information about your creditworthiness. • Affiliates to market to you. • Non-affiliates to market to you. <p>State Laws and individual companies may give you additional rights to limit sharing.</p>

Contact Us	Toll-Free (844) 372-5900 or info@clear-fs.com
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