



PRIVACY POLICY

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Notice Regarding Treatment of Confidential Information

Becker Financial Services, Inc. strongly believes in protecting the confidentiality and security of any information we collect about you. This notice describes our privacy policy and how we treat the information we receive about you.

Collection of Information

When we evaluate your request for our services, provide investment and insurance advice to you and process transactions for your account, you typically provide us with certain personal information necessary for these transactions. We may also use that information to offer you other services we provide which may meet your investment and insurance needs.

The personal information we collect may include:

- Name and address
- Social Security or taxpayer identification number
- Assets, income, liabilities
- Investment account balances
- Insurance contract information
- Health information

Disclosure of Information

We do not sell your personal information to anyone.

We treat all information about current and former Clients and their accounts in a confidential manner. Our employees may access information and provide it to third parties only when completing a transaction at your request or providing our other services to you.

At your request, we may disclose information to attorneys, accountants, lawyers, securities professionals, insurance carriers, life settlement companies, agencies, mutual fund companies, insurance support organizations, broker dealers,

agents and others to assist us, or them, in providing services to you. We may also share information with companies that perform services on our behalf, such as the companies that we hire to perform marketing or administrative services. Companies we may hire to provide support services are not allowed to use your personal information for their own purposes. We may make additional disclosures as permitted by law.

While we share your nonpublic personal information with third parties for the purposes noted above, we ensure that there are contractual restrictions on their use and disclosure of that information.

We also maintain physical, electronic, and procedural safeguards to protect information. Employees and our professional service representatives are required to comply with our established information confidentiality provisions.

Access to and Correction of Information

Generally, upon your written request, we will make available information for your review. Information collected in connection with, or in anticipation of, any claim or legal proceeding will not be made available.

If your personal information becomes inaccurate, or if you need to make a change to that information, please contact us at the number shown below so we can update our records.

Further Information

For additional information regarding our privacy policy, please contact us at:

**Becker Financial Services, Inc.
12470 N. Rancho Vistoso Blvd.
Suite 150
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520.742.2234**