

FACTS

WHAT DOES GLASS JACOBSON 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
- Assets
- Risk Tolerance
- Tax Information
- Investment Experience
- Retirement Assets

How?

All financial companies need to share client's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information; the reasons Glass Jacobson Financial Group chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Glass Jacobson Financial Group share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	Yes
For our marketing purposes— to offer our products and services to you	Yes	Yes
For joint marketing with other financial companies	We don't share	No
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	Yes
For nonaffiliates' everyday business purposes— information about your creditworthiness	We don't share	No
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	We don't share	No

To limit our sharing

- Call: 1-800-356-7666
- Visit us online: glassjacobson.com
- Email us at info@glassjacobson.com

If you are a *new* customer, we can begin sharing your information 30 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

Questions?

Call 1-800-356-7666 or email us at info@glassjacobson.com

Who we are

Who is providing this notice?

Glass Jacobson Financial Group (Including Glass Jacobson P.A. and Glass Jacobson Investment Advisors LLC)

What we do

How does Glass Jacobson 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.

How does Glass Jacobson Financial Group collect my personal information?

We collect your personal information, for example, when you

- seek financial or tax advice, or enter into an investment advisory contract
- become an accounting or tax client, or seek advice about your investments
- tell us about your investment or retirement portfolio

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.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account and or policy unless you tell us otherwise.

Definitions

Affiliates

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

- *Our affiliates include companies within the Glass Jacobson Financial Group primarily including Glass Jacobson P.A. and Glass Jacobson Investment Advisors LLC.*

Nonaffiliates

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

- *Glass Jacobson Financial Group does not share your information with non affiliates so they can market to you.*

Joint marketing

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

- *Our Joint Marketing partners include Glass Jacobson P.A. and Glass Jacobson Investment Advisors LLC.*

Other important information

To opt out of affiliate information sharing in general and/or to opt out of our affiliate joint marketing campaigns please call 1-800-356-7666 and ask for marketing and/or email marketing@glassjacobson.com