

FACTS

WHAT DOES GR FINANCIAL GROUP, LLC 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 Income
- Account Balances and Transaction History
- Assets and Investment Experience
- Name, Address and Driver's License Number

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 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 GR FINANCIAL GROUP, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does GR FINANCIAL GROUP, LLC 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	NO
For our marketing purposes— to offer our products and services to you	NO	We Don't Share
For joint marketing with other financial companies	NO	We Don't Share
For our affiliates' everyday business purposes— information about your transactions and experiences	NO	We Don't Share
For our affiliates' everyday business purposes— information about your creditworthiness	NO	We Don't Share
For nonaffiliates to market to you	NO	We Don't Share

Questions?

Call 520-577-4711 or go to <https://www.gr-financialgroup.com>

Who we are

Who is providing this notice?

GR Financial Group, LLC

What we do

How does **GR Financial Group, LLC** 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 **GR Financial Group, LLC** collect my personal information?

We collect your personal information, for example, when you

- Open an Account or Provide Employment Information
- Seek Investment Advice or Make a Wire Transfer
- Enter into an Investment Management Agreement

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 below for more on your rights.

Definitions

Affiliates

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

- *GR Financial Group, LLC does not have any affiliates*

Nonaffiliates

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

- *GR Financial Group, LLC does not share 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.

- *GR Financial Group, LLC does not jointly market*

Other important information

Information for California, North Dakota, Vermont and Nevada Customers

In response to applicable state law, if the mailing address provided for your account is in California, North Dakota, or Vermont, we will automatically treat your account as if you do not want us to disclose your personal information to non-affiliated third parties for purposes of them marketing to you, except as permitted by the applicable state law. Nevada residents may request to be placed on GR Financial Group LLC's "do not call" list at any time by calling us at (520) 577-4711. Nevada law requires that we provide you with the following contact information for the Bureau of Consumer Protection: Office of the Nevada Attorney General, 555 E. Washington St., Suite 3900, Las Vegas, NV 89101; Telephone: 702-486-3132; Email: BCPINFO@ag.state.nv.us. To learn about additional privacy right protections by GR Financial Group, LLC, please contact us.