

FACTS

WHAT DOES GR FINANCIAL GROUP, LLC (“GR FINANCIAL”) 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
- Assets and account balances
- Investment experience and risk tolerance

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 customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons GR Financial chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does GR Financial 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	Yes	No
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 non-affiliates to market to you	No	We do not share

Questions?

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

GR FINANCIAL GROUP, LLC

What we do

How does GR Financial 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 collect my personal information?	We collect your personal information, for example, when you ■ Open an account or enter into an investment advisory contract ■ Give us your income information or provide employment information ■ Tell us about your investment or retirement portfolio or give us your contact information We also collect your personal information from other companies.
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 non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under certain state law.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ■ <i>GR Financial has no affiliates</i>
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■ <i>GR Financial does not share with non-affiliates so they can market to you</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ <i>GR Financial doesn't jointly market</i>

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'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, please contact us.