



PRIMARY BUSINESS NAME: ACCURATE SOLUTIONS GROUP, LLC.

## PRIVACY POLICY STATEMENT

Your privacy is very important to us. We value your trust and want you to understand what information we collect, how we protect it, and how we use it. We treat personal information - non-public information that identifies you - with respect, and in accordance with this Privacy Policy.

### INFORMATION WE COLLECT

When you decide to engage our services, we obtain financial and personal information directly from you. We collect identification and contact information, as well as financial, transaction, investment objectives, and investment experience information from applications you complete, transactions with others or made by us on your behalf, and from outside companies. Examples of the sources and types of information we collect include:

- Information required on account applications and agreements, containing your name, address, telephone number, date of birth, social security number, e-mail address, investment objectives, income, investment experience, employment information, telephone numbers, and accounts with others;
- Information regarding your brokerage and/or investment advisory transaction history with us, service providers, such as clearing firms, account custodians, or other companies; and
- Information collected by other companies on their applications, such as custodians, mutual fund companies, variable annuity and life sponsors, fixed insurance companies, banks, whose services or products are introduced by us.

### INFORMATION WE MAY DISCLOSE AND TO WHOM WE MAY DISCLOSE INFORMATION

We do not disclose your personal information to entities that do not transact business with us (non-affiliates). We make every effort to ensure that the entities we do business with safeguard and keep your personal and financial information confidential.

The personal information we collect, as described in this policy allows service providers such as our staff, affiliates, representatives, their affiliated businesses, insurance companies, custodians, banks, broker/dealers, other investment advisers to provide you financial services such as

- Providing administrative, customer assistance, clearing, operational, or other services;
- Preparing, printing and delivering portfolio management performance reports, confirmation statements, and other documents;
- Executing securities transactions; and
- Our affiliates marketing products and services to you.

### DISCLOSURES PERMITTED BY LAW

We can disclose the information we collect as required by law. For example, we may disclose information, as required by law, to law enforcement agencies, insurance and securities regulatory agencies, or in response to a court order.

**INSTRUCTIONS ON HOW TO NOTIFY US** Should you wish to opt out of the terms of this privacy policy, please contact:

Curt D. Knotick, CCO  
ASG Investment Management, LLC  
compliance@asgretire.com  
800.827.6186

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