

## **Advanced Advisor Group, LLC Privacy Promise**

We believe you have a right to know what we do with health and financial information we gather about you in the course of processing, administering, and maintaining the financial products you purchase from our company. We also want to assure you that we are properly safeguarding this important information. Because we cherish the integrity of our customer relationships, we have prepared the following summary of our privacy policy, which is based on the federal law governing customer privacy and on our own high standards of customer confidentiality.

1. We need accurate, current health and financial information about you so that we can determine your insurability and recommend products to meet your specific needs at a fair price. We collect personal information that you provide to us on applications, forms, and in interviews. In addition, we may receive information resulting from your transactions with any companies with whom we have business relationships. In some cases, we also may receive information from consumer reporting agencies and other sources in the course of processing, underwriting, or administering your accounts
2. We will share your personal financial and health information only with authorized employees, representatives, and trusted third parties, such as medical examination providers, whose services are required to assure the highest level of service to you. We will not disclose any non-public personal information about you, or about any other customers or former customer, except as authorized by law, as described in this privacy statement or as otherwise communicated to you. Because we respect and share your concern for privacy, we will not provide your health information to anyone outside of our companies except as described above. We will notify you if we make any changes in this policy statement.
3. We may share selected financial information about you with any companies with whom we have business relationships in order to better serve you and to offer you worthwhile products and services.
4. Similarly, we may cooperate with other reputable financial institutions in order to bring additional products and services to your attention. We will disclose only financial information that is necessary to such individuals or companies who perform marketing services on our behalf, or to other trusted financial institutions with whom we have cooperative agreements. We will choose these partners carefully and hold them to our own high standards of respect for your privacy.
5. You have the right to see and correct any personal information we may collect about you. If you believe any of the information we have collected about you is erroneous, we would appreciate your assistance in making corrections.
6. We will protect all information collected about you, and we will restrict access to your non-public personal information by maintaining physical, electronic, and procedural safeguards.
7. Above all, we value your trust and your confidence in our ability to manage and protect your important personal information. You have our word that we will protect your information as if it were our own.
8. As a consumer and our customer you have the right under the law and the regulations to “opt-out” of any use of your Private Information other than the permitted uses or sharing among affiliated companies as described above. To “opt-out” please mail your request to the address below.

*If you have questions or concerns about privacy policy, please contact us at the address listed below. Thank you for placing your trust in us.*

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