

FACTS**WHAT DOES FIRESIDE FINANCES, 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: <ul style="list-style-type: none"> ▪ Social Security number and Investment experience ▪ Income and Assets ▪ Credit card or other debt and Retirement assets
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 Fireside Finances, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Fireside Finances, 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 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?	Contact Robert J. Shaye at (916) 538-5351 or rob@firesidefinances.com
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What we do

How does Fireside Finances, 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 Fireside Finances, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none">▪ Enter into an investment advisory contract or Seek financial or tax advice▪ Seek advice about your investments or Tell us about your investment or retirement earnings▪ tell us about your investment or retirement portfolio
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none">▪ 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.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Fireside Finances, LLC has no affiliates.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Fireside Finances, LLC does not share with nonaffiliates so they can market to you.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Fireside Finances, LLC doesn't jointly market.

Other important information

Not Applicable.