

PRIVACY POLICY NOTICE – ELITE RETIREMENT GROUP, INC.

Elite Retirement Group, Inc. (“Elite Retirement Group”) adopted this policy with recognition that protecting the privacy and security of the nonpublic personal information we obtain about our clients is an important responsibility. We also know that you expect us to service you in an accurate and efficient manner. To do so, we must collect and maintain certain nonpublic personal information about you. We want you to know what information we collect and how we use and safeguard that information.

WHAT INFORMATION WE COLLECT

We collect certain nonpublic personal information about you (such as your name, address, social security number, etc.) that you provide on applications or other forms as well as communications (electronic, telephone, written or in person) with you or your authorized representatives (such as your attorney, accountant, etc.). We also collect information about your brokerage accounts and transactions (such as purchases, sales, account balances, inquiries, etc.).

WHAT INFORMATION WE DISCLOSE

Elite Retirement Group does not disclose the nonpublic personal information we collect about our clients to anyone except: (1) in furtherance of our business relationship with clients, and then only to those persons necessary to effect the transactions and provide the services that clients authorize (such as broker-dealers, custodians, independent managers etc.); (2) to persons assessing our compliance with industry standards (e.g., professional licensing authorities, etc.); (3) our attorneys, accountants, and auditors; or (4) as otherwise provided by law.

We are permitted by law to disclose the nonpublic personal information about you to governmental agencies and other third parties in certain circumstances (such as third parties that perform administrative services on our behalf). These third parties are prohibited to use or share the information for any other purpose. If you decide to either terminate our services or become an inactive client, we will continue to adhere to our Privacy Policy, as may be amended from time to time.

We are required to report any suspected exploitation of vulnerable adult clients to the proper authorities under federal and state statutes.

Mobile Device and Text Message Contact Information

If you provide your mobile phone number and consent to receive text messages from Elite Retirement Group, we may use your mobile number to send appointment reminders, service-related updates, account notifications, and other communications related to our services.

Your mobile phone number and SMS consent information will not be shared, sold, rented, or disclosed to third parties or affiliates for marketing or promotional purposes. Text messaging originator opt-in data and consent will not be shared with any third parties, except as necessary to provide text messaging services.

You may opt out of receiving text messages at any time by replying STOP to any message. For assistance, reply HELP or contact our office directly at 715-341-8899 or frontdesk@retireidea.com.

Message and data rates may apply. Message frequency may vary.

SECURITY OF YOUR INFORMATION

We restrict access to your nonpublic personal information to those employees who need to know that information to service your account. We maintain physical, electronic and procedural safeguards that comply with applicable federal or state standards to protect your nonpublic personal information.

CHANGES TO OUR PRIVACY POLICY OR RELATIONSHIP WITH YOU

Our policy about obtaining and disclosing information may change from time to time. We will provide you notice of any material change to this policy before we implement the change.

OPTING OUT

Clients cannot opt out of allowing Elite Retirement Group, Inc. to share their nonpublic personal information with non-affiliated third parties which are necessary to service their accounts.

REQUESTS FOR INFORMATION

For a copy of our Privacy Policy, please contact the Chief Compliance Officer either in writing at 1320 Okray Ave, Plover, WI 54467, or by phone at (715) 341-8899.