



Galecki Financial Management, Inc.

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Privacy Notice

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Galecki Financial Management (GFM) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients' nonpublic personal information (information).

It is the policy of GFM to restrict access to all current and former clients' information (ex. Information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services to the client. GFM may disclose the client's information if GFM is: (1) previously authorized to disclose the information to individuals and/or entities not affiliated with GFM, including, but not limited to the client's other professional

advisors and/or service providers (ex. Attorney, accountant, insurance agent, broker-dealer, investment advisor, account custodian, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing and/or transmittal by GFM in order to facilitate the commencement, continuation, or termination of a business relationship between the client and a nonaffiliated third party service provider (ex. Broker-dealer, investment advisor, account custodian, insurance company, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

GFM permits only authorized employees and affiliates who have signed a copy of the GFM Privacy Policy to have access to client information. Employees violating the GFM Privacy Policy will be subject to the disciplinary process. Additionally, whenever GFM hires other organizations to provide services to Galecki clients, Galecki will require them to sign confidentiality agreements and/or the Privacy Policy.

Should you have any questions regarding the above, please contact Brady McArdle at the GFM office.