

FACTS**What does Cornerstone Financial Group, 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:

- Social Security number and date of birth
- Phone numbers, e-mail addresses, and physical addresses
- Financial details and other personal information applicable to investment management and financial planning

When you are *no longer* our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share their client's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their client's personal information, the reasons Cornerstone Financial Group chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Cornerstone Financial Group, 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	Yes	Yes
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes— information about your transactions and experiences	No	N/A
For our affiliates' everyday business purposes— information about your creditworthiness	No	N/A
For nonaffiliates to market to you	No	We don't share

Questions?

Please call us (402) 758-0700 or email our team at team@cornerstonefinancialgroup.com

Who we are

Who is providing this notice?

You are receiving this notice from Cornerstone Financial Group, LLC, a provider of investment management and personal financial planning services.

What we do

How does Cornerstone Financial Group 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 Cornerstone Financial Group collect my personal information?

We collect your personal information, for example, when you

- request our investment management or financial planning services
- have engaged our firm to manage your investments
- are a related party or contact person to someone who has engaged us for the management or planning of their finances

Why can't I limit all sharing?

Federal law gives you the right to limit only

- 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. Cornerstone Financial Group, LLC does not have any affiliate companies.

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies. Cornerstone Financial Group, LLC does not share your information with nonaffiliates for the purpose of marketing.

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

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