

LASER FINANCIAL GROUP

Proven Time-Tested Results with Integrity!

PRIVACY & CONFIDENTIALITY POLICY

When appropriate, Laser Financial Group, LC, is referred to below as “we.”

It is the policy of Laser Financial Group, LC, to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you.

We **do** collect nonpublic personal information about you from the following sources:

- Information we receive from you during discussions and meetings, on worksheets, applications, federal and state tax forms, and other documents we use in financial and related services.
- Information about your transaction(s) with us, our affiliates, and others.
- Information you may provide to us from outside agencies such as banks and brokerage houses.

We **do not** disclose any nonpublic personal information about our clients or former clients, except as permitted, required by law, or approved by you in writing as listed below:

- Requirements to comply with federal, state, or local law
- Requirements to disclose information in response to legal subpoenas
- Requirements to comply with national, state, or local licensing rules
- Items you permit or request us to disclose, as authorized by you in writing

We maintain physical, electronic, and procedural safeguards that comply with applicable standards to guard your nonpublic personal information.

Please use the information below to contact us if you have any questions about this policy.

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