

FACTS**WHAT DOES Englebert Financial Advisers, LLC (“Englebert”) 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 Income
- Account Balances and Transaction History
- Assets and Employment History

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 customer information to run their everyday business. In the section below, we list the reasons financial companies can share their customer’s personal information, the reasons Englebert Financial Advisers, LLC chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Englebert 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 with other financial companies	No	We don’t share
For joint marketing with other financial companies	No	No
For our affiliates’ everyday business information about your transactions and experiences.	No	No
For our affiliates’ everyday business purposes information about your creditworthiness.	No	We don’t share
For our affiliates’ to market to you	No	Yes
For our non-affiliates’ to market to you	No	We don’t share

To Limit our sharing

- Call Jamie Englebert at 610-248-0566
- Send an email to jamie@englebertfa.com

Please Note:

If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

Questions?

Call 610-248-0566 or go to www.englebertfa.com

Who we are

Who is providing this notice?

- Englebert Financial Advisers, LLC

What we do

How does Englebert 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 Englebert collect my personal information?

We collect your personal information, for example, when you:

- open an account
- seek advice about your investments
- provide employment information or show your drivers' license

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 non-affiliates to market to you

State laws and individuals companies may give you additional rights to limit sharing.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial.
Not Applicable

Non-affiliates

Companies not related by common ownership or control. They can be financial and non-financial companies.
Englebert does not share with non-affiliates so they can market to you.

Joint Marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
Englebert does not joint market