

FACTS**WHAT DOES SEQUOIA 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:

- Name, address, telephone, facsimile, email, tax ID, social security number, DOB, investment objectives
- Account balances, positions, and account history

How?

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

Reasons we can share your personal information	Does Sequoia 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	No
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	No
For our affiliates to market to you	No	No
For nonaffiliates to market to you	No	No

**To limit
our sharing**

- Call **330-375-9480**—our menu will prompt you through your choice(s)
- Visit us online: **www.sequoia-financial.com**

Please note:

Consumers may limit information sharing with our affiliates and subsidiaries (but not from the sharing of information necessary for us to follow the law, as permitted by law, or to give you the necessary service on your accounts with us.)

Questions?

Call 330-375-9480 or go to www.sequoia-financial.com

Who we are

Who is providing this notice?

Sequoia Financial Group, LLC

What we do

How does Sequoia Financial Group, LLC protect my personal information?

SFG safeguards your personal information by limiting access to only those employees of SFG and its affiliates that provide products or services to you, to those who need access to your information to service your account, to those that must come into contact with your information as part of their job responsibilities with either SFG or an affiliate of SFG, or to outside vendors who are contractually bound to protect the privacy of your non-public information. In addition, SFG maintains physical, electronic and procedural safeguards that meet applicable legal standards to protect your non-public personal information.

How does Sequoia Financial Group, LLC collect my personal information?

We collect your personal information, for example:

- SFG collects information furnished by you on account applications or other forms provided by you.

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.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

Joint marketing

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

Other important information

Even if SFG ceases to provide you with financial products or services, the SFG Privacy Policy will continue to apply to you and SFG will continue to treat your nonpublic information with strict confidentiality. To obtain a full copy of our Privacy Policy please go to <https://www.sequoia-financial.com/disclosures>.