



Privacy Policy Notice

FACTS- WHAT DOES TARGETED FINANCIAL SERVICES, LLC DO WITH YOUR FINANCIAL 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 depends on the product or service you have with us. This information can include:

- *Social security number and income
- *Account balances and assets
- *Transaction history

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

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
For our everyday business purposes -such as processing your transactions, maintaining your account(s), responding 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	No
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For joint marketing with other financial companies	No	Not Applicable
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For our affiliates' everyday business purposes- information about your transactions and experiences	No	Not Applicable
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For our affiliates' everyday business purposes- information about your creditworthiness	No	Not Applicable
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For our affiliates to market to you	No	Not Applicable
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For nonaffiliates to market to you	No	Not applicable
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Questions?	Call us at (732)750-9880 or visit www.targetedfinancial.com	
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Who is providing this notice	Targeted Financial Services, LLC	
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How does Targeted Financial Services, LLC, protect my personal information?	To protect your personal information from unauthorized access and use, we use measures that comply with federal law. These measures include computer safeguards and secure files and building.	
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How does Targeted Financial Services, LLC, collect my personal information?	We collect your personal information, for example, when you: *Open an account *Deposit money *Seek advice about your investments *Enter an investment advisory contract *Tell us about your investment or retirement portfolio or earnings We also collect your personal information from other companies.
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Definitions

Affiliates- Companies related by common ownership and control. They can be financial and non-financial companies. **We do not share information with our affiliates.**

Nonaffiliates- Companies not related by common ownership and control. They can be financial or non-financial companies. **We do not share information with our non-affiliates.**

Joint Marketing- A formal agreement between nonaffiliated financial companies that together market financial products or service to you. **We do not jointly market.**