

**TELLONE FINANCIAL SERVICES, INC.
TELLONE MANAGEMENT GROUP, INC.**

**6200 E. Canyon Rim Road, Suite 201
Anaheim Hills, CA 92807**

PRIVACY NOTICE

Dear Client:

I am writing this letter to ensure that you are aware of our privacy policy. Tellone Financial Services, Inc., Tellone Management Group, Inc., and our affiliates (collectively, “we” or “us”), are committed to safeguarding the confidential information of our clients. We hold all personal information provided to us in the strictest confidence. These records include all personal information that we collect from you in connection with any of the services provided by us. We have never disclosed information to nonaffiliated third parties, except as permitted by law, and do not anticipate doing so in the future. Our policy with respect to personal information about you is listed below.

- We limit employee access to information only to those who have a business or professional reason for knowing, and only to nonaffiliated parties as permitted by law.
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- The categories of nonpublic personal information that we collect from a client depend upon the scope of the client engagement. It will include information about your personal finances, information about your health to the extent that it is needed for the planning process, information about transactions between you and third parties, and information from consumer reporting agencies.
- For unaffiliated third parties that require access to your personal information for everyday business purposes, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review our records as permitted under law.
- We do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose.
- We will not disclose, share or sell your non-public personal information without obtaining your written consent. We are bound by law to afford you the right and the opportunity to choose not to have your information shared.
- Personally identifiable information about you will be maintained during the time you are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws. After this required period of record retention, all such information will be destroyed. If you close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

If you have any questions regarding our above outlined privacy policies or wish to discuss them further, please give our office a call.

Sincerely,

Dean C. Tellone

President,
TELLONE FINANCIAL SERVICES, INC.
TELLONE MANAGEMENT GROUP, INC.

**Telephone: (714) 998-2290
Facsimile: (714) 998-5613**

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