

PRIVACY POLICY NOTICE

FACTS

WHAT DOES COORDINATED FINANCIAL SERVICES, INC. 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, but is not limited to:

- Social Security number and income;
- Assets and transaction history; and
- Investment experience and risk tolerance.

When you are *no longer* our Client, we continue to share your information as described in this notice.

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 Coordinated Financial Services, Inc. chooses to share and whether you can limit this sharing.

Reasons we can share your personal information	Does Coordinated Financial Services, Inc.	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 reporting 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	We do not share
For our affiliates' everyday business purposes – information about your transactions and experiences	NO	We do not share
For our affiliates' everyday business purposes – information about your creditworthiness	NO	We do not share
For our affiliates to market to you	NO	We do not share
For non-affiliates to market to you	NO	We do not share

To limit our sharing:

Please note: If you are a new Client, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our Client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing. By executing an Investment Advisory Agreement with Coordinated Financial Services, Inc., the Client agrees to "opt-in" to this privacy policy.

Questions?

Call: (303) 770-5401

Who we are

Who is providing this notice?

COORDINATED FINANCIAL SERVICES, INC.

What we do

How does Coordinated Financial Services, Inc. protect my personal information?

To protect your personal information from unauthorized access and use, we restrict access to your nonpublic personal information to those employees who need to know that information to service your account. We also maintain physical, electronic and procedural safeguards that comply with applicable federal or state standards to protect your nonpublic personal information.

How does Coordinated Financial Services, Inc. collect my personal information?

We collect your personal information, for example, when you

- open an account or give us contact information;
- enter into an investment adviser contract or give us your income information;
- tell us about your investment or retirement portfolio.

We also collect your personal information from other companies.

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 individual companies may give you additional rights to limit sharing.

Definitions

Affiliates

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

Non-Affiliates

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

Coordinated Financial Services may share information with broker-dealer firms having regulatory requirements to supervise certain of Coordinated Financial Services' activities. By signing and executing Coordinated Financials Investment Management Agreement, you agree to opt into this privacy policy.