



PRIVACY & CONFIDENTIALITY POLICY

When appropriate, Laser Financial Group, LC, is referred to below as “we.”

It is the policy of Laser Financial Group, LC, to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you.

We do collect nonpublic personal information about you from the following sources:

- Information we receive from you during discussions and meetings, on worksheets, applications, federal and state tax forms, and other documents we use in financial and related services.
- Information about your transaction(s) with us, our affiliates, and others.
- Information you may provide to us from outside agencies such as banks and brokerage houses.

We do NOT disclose any nonpublic personal information about our clients or former clients, except as permitted, required by law or approved by you in writing as listed below:

- Requirements to comply with federal, state or local law,
- Requirements to disclose information in response to legal subpoenas,
- Requirements to comply with national, state or local licensing rules,
- Items you permit or request us to disclose, as authorized by you in writing,

We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you have any questions about this privacy and confidentiality Policy, please feel free to discuss them with us, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.