

FACTS**WHAT DOES STONEBRIDGE FINANCIAL PLANNING 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:

- **Social Security Number and Income**
- **Investment Experience and Assets**
- **Employment Information and Risk Tolerance**

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

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 Stonebridge Financial Planning Group, LLC® chooses to share; And whether you can limit this sharing.

Reasons we can share your personal information	Does Stonebridge Financial Planning Group share?	Can you limit this sharing?
For our everyday business purposes – With one or more of our affiliated entities, at our sole discretion and for purposes either related or unrelated to services we provide you, and to nonaffiliated entities that either perform services for us or function on our behalf (such as check printing services, account aggregation providers, broker/dealers, investment companies, and insurance companies)	YES	NO
For our marketing purposes – to offer our products and services to you	NO	We don't share
For joint marketing with other financial companies	NO	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	NO	We don't share
For our affiliates' everyday business purposes – information about your creditworthiness	NO	We don't share
For non-affiliates to market to you	NO	We don't share

Questions?

Call **1-407-695-7100**

Who we are

Who is providing this notice?

Stonebridge Financial Planning Group, LLC®

What we do

How does Stonebridge Financial Planning Group protect my personal information?

We maintain physical, electronic, and procedural safeguards to protect your nonpublic personal information. Our safeguards include measures to protect your information prior to, during and upon termination of our financial services engagement (i.e., disposal of your data).

How does Stonebridge Financial Planning Group collect my personal information?

We collect your personal information, for example, when you

- **Seek advice about your Investments** or **Enter into an investment advisory contract**
- **Show your driver's license** or **Give us your contact information**
- **Tell us about your investment or retirement portfolio**

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.

Definitions

Affiliates

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

- **Stonebridge Financial Planning Group has no affiliates.**

Non-affiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies. We share personal client information with Commonwealth Financial Network, LLC, a nonaffiliated registered broker/dealer.

- **Stonebridge Financial Planning Group does not share with non-affiliates so they can market to you.**

Joint Marketing

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

- **Stonebridge Financial Planning Group does not jointly market.**

Other important information

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