

PRIVACY NOTICE REGARDING CONFIDENTIAL CLIENT INFORMATION

Maintaining the trust and confidence of our clients is a high priority. That is why we want you to understand how we protect your privacy when we collect and use your plan-related information (“Information”), and the steps that we take to safeguard that Information. This notice is provided to you on behalf of Benefit Funding Services Group.

Information We Collect: In connection with providing consulting services, we obtain non-public personal Information about you, including:

- Information we receive from you or your service provider regarding your retirement plan;
- Information about your transactions with us, our affiliates, or others; and
- Information received from service providers or other third parties, such as account balances or demographic information.

Categories of Parties to Whom We Disclose: We will not disclose Information regarding your plan except under the following circumstances:

- To your authorized Service Provider
- To your attorney, trustee or anyone else who represents you in a fiduciary capacity;
- To our auditors or our parent company, Focus Financial Partners; and
- To government entities or other third parties in response to subpoenas or other legal process as required by law or to comply with regulatory inquiries.

How We Use Information: Information is maintained internally and not revealed to any outside third parties, with the exception of government entities and/or legal requests to comply with Federal, State, and Self-Regulatory Organization requirements;

Access to and Correction of Information: Upon your request, we will make available your Information for your review. If during such a review or in the course of our regular meetings and discussions you find we have incorrect Information, we will generally make any corrections you request. The only exception, in accordance with legal requirements, Information collected in connection with, or in anticipation of, any claim or legal proceeding will not be made available.

Our Security Policy: We restrict access to nonpublic personal information about your plan to those individuals who need to know that information to provide products or services to you and perform their respective duties. We maintain physical, electronic, and procedural security measures to safeguard confidential client information.

Former Clients: Even if you are no longer a client of Benefit Funding Services Group, our Privacy Policy will continue to apply to you.

Complaint Notification: Please direct complaints to: Benefit Funding Services Group, 2040 Main Street, Suite #150, Irvine, CA 92614.

Changes to This Privacy Policy: If we make any substantial changes in the way we use or disseminate confidential information, we will notify you. The examples contained in this Privacy Policy are illustrations and they are not intended to be exclusive. If you have any questions concerning this Privacy Policy, please write to: Benefit Funding Services Group, 2040 Main Street, Suite #150, Irvine, CA 92614.