

FACTS	WHAT DOES MCCORMICK FINANCIAL ADVISORS, LLC DO WITH YOUR PERSONAL INFORMATION?
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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.
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What?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ■ social security number ■ income and employment information ■ account balances, account transactions, and wire transfer instructions ■ assets, investment experience, risk tolerance, and retirement assets <p>When you are no longer our customer, we continue to share your information as described in this notice.</p>
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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 customer's personal information; the reasons McCormick Financial Advisors, LLC chooses to share; and whether you can limit this sharing.
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Reasons we can share your personal information	Does McCormick Financial Advisors, LLC share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	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 –	NO	We don't share
For our affiliates' everyday business purposes – Information about your creditworthiness	NO	We don't share
For nonaffiliates to market to you	NO	We don't share

Questions?	Call 406.522.3201 or go to www.mccormickfinancialadvisors.com
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Who we are

Who is providing this notice?

McCormick Financial Advisors, LLC

What we do

How does McCormick Financial Advisors, LLC protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

McCormick Financial Advisors, LLC also requires nonaffiliated third party service providers and professional consultants to agree and adhere to the requirements set forth in Non-Disclosure Agreements.

How does McCormick Financial Advisors, LLC collect my personal information?

We collect your personal information, for example, when you

- **open an account, provide account information**
- **seek advice about your investments, enter into an investment advisory contract**
- **direct us to buy securities, direct us to sell your securities**
- **give us your income information, provide employment information**
- **tell us about your investment or retirement portfolio, tell us about your investment or retirement earnings**
- **make a wire transfer, tell us who receives the money, tell us where to send the money**
- **give us your contact information, show your government-issued ID or your driver's license**

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.

- **McCormick Financial Advisors, LLC has no affiliates.**

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- **McCormick Financial Advisors, LLC does not share with nonaffiliates so they can market to you.**

Joint Marketing

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

- **McCormick Financial Advisors, LLC does not jointly market.**

Other Important Information