



Privacy Policy 2025

Schaeffer Financial, LLC (“SF”) is committed to protecting your personal information. Privacy and security are fundamental elements of our commitment to our clients. We do not disclose any nonpublic personal information about current or former clients to anyone, except as outlined below.

Our Commitment:

- We are committed to protecting your privacy at all times.
- We do not share your personal information with outside companies for purposes of selling their products and services to you.

We collect nonpublic personal information about you, which may include, but is not limited to:

- Information from forms that you may complete and send to SF in connection with opening a separately managed account (such as name, address, and social security number)
- Information you may give SF orally
- Information about the amount you have invested with SF
- Information about any bank account you may use for transfers between a bank account and a client account managed by SF

Except for disclosure that may be required by applicable law, SF shall maintain the strictest confidence regarding the affairs of our clients. During the normal course of business operations some situations may arise which may require us to share information. Some examples are:

- When protecting against or preventing fraud
- In resolving customer disputes
- In dealings with SF’s attorneys, compliance consultants or auditors
- When requested by a consumer reporting agency in accordance with other applicable law
- When complying with applicable law, such as a valid subpoena

We restrict access to your personal information to the designated personnel who manage and service your account. All confidential information is protected against unauthorized access to ensure the security of customer information. Client information in paper form is kept in a locked and secure place with limited access. We maintain physical, electronic, and procedural safeguards to protect your nonpublic, personal information.

We may share information about you with our affiliates as permitted by law, such as information about your transactions or experiences with us, our affiliates, or others. SF will only share non-public customer information with outside entities in order to help administrate your business and/or provide you with specialized services. We may disclose information to the following types of outside companies:

- Financial institutions that would serve as the custodian of your assets
- Non-financial companies that prepare proxy mailings or account statements
- Independent contractors who program our software to help provide you protection and additional services
- Service providers we hire to help administrate our business
- Service providers to whom you direct us to share information, such as your CPA or legal counsel

Companies we hire for services of this kind are not allowed to use your personal information for their own purposes and are contractually obligated to maintain strict confidentiality. We limit their use of your personal information to the performance of the specific service we have requested.

For additional information please call us at (301) 933-555

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