

Mail-in Form

If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.

Apply my choices only to me]

Mark any/all you want to limit:

- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

| | |
|------------------|--|
| Name | |
| Address | |
| City, State, Zip | |
| [Account #] | |

Mail to:
Pointer Financial Advisors, LLC
12790 Hall Shop Rd., # 534
Highland, MD 20777

Rev. 06/2023

FACTS

WHAT DOES POINTER FINANCIAL ADVISORS, 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
- Total net worth
- Account balances

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 Pointer Financial Advisors chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information | Does Pointer Financial Advisors 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 | Yes | No |
| For joint marketing with other financial companies | No | N/A |
| For our affiliates' everyday business purposes — information about your transactions and experiences | No | N/A |
| For our affiliates' everyday business purposes — information about your creditworthiness | No | N/A |
| For our affiliates to market to you | No | No |
| For nonaffiliates to market to you | No | N/A |

To limit our sharing

- Call (301) 804-0250
- Visit us online www.pointeradvisors.com or
- Mail the form below. Please note:
 If you are a *new* customer, we can begin sharing your information [30] days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice.
 However, you can contact us at any time to limit our sharing.

Questions?

Call (301) 804-0250



| Who we are | |
|--|---|
| Who is providing this notice? | Pointer Financial Advisors, LLC |
| What we do | |
| How does Pointer Financial Advisors 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. |
| How does Pointer Financial Advisors collect my personal information? | We collect your personal information, for example, when you <ul style="list-style-type: none"> ■ open an account] or deposit money |
| Why can't I limit all sharing? | Federal law gives you the right to limit only <ul style="list-style-type: none"> ■ 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. |
| What happens when I limit sharing for an account I hold jointly with someone else? | Your choices will apply to everyone on your account. |
| Definitions | |
| Affiliates | Companies related by common ownership or control. They can be financial and nonfinancial companies. ■ Pointer Financial Advisors does not have any affiliates. |
| Nonaffiliates | Companies not related by common ownership or control. They can be financial and nonfinancial companies. ■ <i>Non-Affiliated information is N/A to Pointer Financial Advisors</i> |
| Joint marketing | A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ <i>Joint marketing information is N/A to Pointer Financial Advisors</i> |
| Other important information | |
| Pointer Financial Advisors Privacy Notice is enclosed in this information. | |

