

Stewardship Advisory Group, LLC
PRIVACY POLICY NOTICE

Information Adviser Collects. In connection with providing clients with investment products, financial advice, or other services, Stewardship Advisory Group, LLC (the “Adviser”) obtains non-public personal information about clients including:

- ✓ Information Adviser receives from Client on applications, forms and documents;
- ✓ Information about Client transactions with Adviser or others; and,
- ✓ Information from third-parties.

Information Adviser Discloses. Adviser will not disclose information regarding Client or Client’s account with Adviser except under the following circumstances:

- ✓ To Client’s Advisory Representative, his or her manager and necessary staff of the Adviser;
- ✓ To establish or maintain an account with an unaffiliated third party, a clearing broker providing services to Client, and/or the broker/dealer firm with which the Advisory Representative is separately registered;
- ✓ To third party agencies assisting in the implementation of Client’s Plan, upon Client approval;
- ✓ To government entities or other third parties in response to subpoenas or other legal process as required by law.

Adviser’s Security Policy. Only those individuals who need it to perform their jobs are authorized to have access to confidential client information. Adviser maintains physical, electronic, and procedural security measures that comply with applicable state and federal regulations to safeguard confidential Client information.

Closed or Inactive Accounts. If Client decides to close account(s) or become an inactive customer, Adviser will adhere to the privacy policies and practices as described in this notice.

Changes to this Privacy Policy. If Adviser makes any substantial changes in the way confidential information is used or disseminated, Adviser will notify the Client.

If Client has any questions concerning this privacy policy, please write to us at 17011 SR 50, Suite 203, Clermont, FL 34761.