

CUSTOMER PRIVACY INFORMATION



As our client, you have entrusted Suncoast Advisory Group to help you achieve financial independence.

To maintain that trust, we are committed to protect the privacy and security of the personal information that we collect about our customers. This notice is intended to help you understand how we collect, handle and safeguard that information.

We treat the personal information of our customers in a confidential manner. We do not provide any information to unrelated companies for the purpose of marketing their products or services to our customers.

When you establish a relationship with us, you are requested to furnish personal and financial information used to assist in assessing your investment objectives and goals. The information you share with us is often private and confidential, and we are therefore committed to its protection. In addition to the information collected, during the course of our relationship we may also collect a variety of nonpublic personal information from other sources. The confidential information we collect may include the following:

1. Information we receive from you, such as your name, address, social security number, assets, income, investment objectives and other information as required by Industry Regulators.
2. Information about your transactions, including balances, portfolio holdings, cash balances, margin balances and customer statements. Also included may be portfolio evaluations.
3. Information we receive from our custodian-TD Ameritrade Institutional, our correspondent clearing broker, various investment sponsors, unaffiliated custodians and money managers, your account, attorney or other professionals obtained by you.
4. Medical or health information that you authorize us to receive from doctors or other health care providers and medical vendors in relation to the advice provided on a traditional or insurance policy.

Suncoast Advisory Group does not share customer information with any third party other than those that are authorized by you or that are required in order for us to provide services agreed upon by the client, service an account, execute a transaction, or if required to do so by regulation or law. We may share information with our custodian, TD Ameritrade Institutional, a third party money manager or unaffiliated custodian as is necessary to provide advisory services.

Suncoast Advisory Group has established policies to maintain physical, electronic, and procedural safeguards to maintain the confidentiality of the personal information of our customers. Appropriate measures are taken to ensure that access is available to those individuals who need to know that information in order to provide our products and services.

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Connect with Rick!

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BEGINS
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