

February 7, 2024



**SUMMIT
FINANCIAL**
Working with People You Trust

PRIVACY POLICY

Facts	WHAT DOES SUMMIT FINANCIAL CONSULTING 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?	<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 and financial information • Account balances and transaction history <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>	
How?	All financial companies need to share customer’s 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 Summit Financial Consulting chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information.	Do we 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	We don’t share
For our affiliates’ everyday business purposes- Information about your transactions and experiences, credit worthiness and to market to you	No	We don’t share
For our non-affiliates to market to you	No	We don’t share
For buying, selling, or sharing of client data gathered for text messaging.	No	NA

To limit our sharing	<p>Call: 586-226-2100</p> <p>Please note: If you are a <i>new</i> client, we can begin sharing your information from the date we sent this notice. When you are <i>no longer</i> our client, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
Who is providing this notice?	Summit Financial Consulting LLC DBA Summit Financial Working With People You Trust
WHAT WE DO	
How do we protect your 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 do we collect your personal information?	We collect your personal information when you engage our services and we gather information to provide your services. We may also collect your personal information from others, such as affiliates or other companies.
Why can't you limit all sharing?	<p>Federal law gives you the right to limit only:</p> <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 non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
DEFINITIONS	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies.
Non-Affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies.
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you.
Other important information	
<p>This notice applies to individual consumers who are customers or former customers. This notice replaces all previous notices of our consumer privacy policy, and may be amended at any time. We will keep you informed of changes or amendments as required by law.</p>	
Questions?	Call: 586-226-2100