

## Privacy Notice

At the affiliated companies of Brandon Financial Planning, Inc., Brandon Investments, Inc., and Brandon Underwriting Specialists, Inc., we are committed to safeguarding the privacy of our clients. While we collect information from and about you in providing certain products and services, we want you to know that we strive to maintain the confidentiality of the personal information we have. To help you understand how we protect your personal information, this short notice provides an overview of our current privacy policy and practices.

### Why are you getting this notice now?

The Gramm-Leach Bliley Act of 1999 and recent regulations from the Act established new requirements for financial institutions and advisors like us regarding the provision of privacy protections for and notices to consumers and clients like you.

### Information we collect.

We collect nonpublic personal information about you in order to provide, administer, and service financial products and services. This information may come from the following sources:

- Information we receive from you on applications and other forms;
- Information about your transactions with us, our affiliates, or others, and;
- Information we receive from a consumer-reporting agency.

### Confidentiality and Security

We restrict access to nonpublic personal information about you to employees and agents who need to know that information to provide products and services to you. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted by law. For example, when authorized or requested by you, we may disclose information to other companies in connection with obtaining their products or services. Also, we maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you would like a copy of our long-form Notice of Privacy Policy and Practices, or have any questions regarding these matters, please direct your inquiry to: Ray Brandon, Brandon Investments, Inc., 5101 Wheelis Drive, Ste. 112, Memphis, TN 38117.