

FACTS	WHAT DOES SOUND INCOME STRATEGIES, 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 depends on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social Security number and financial information</li> <li>• Account balances and transaction history</li> </ul>
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 Sound Income Strategies, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information.	Does Sound Income Strategies, LLC share?	Can you limit this sharing?
<b>For our everyday business purposes:</b> Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes:</b> To offer our products and services to you	No	N/A
<b>For joint marketing with other financial companies</b>	No	N/A
<b>For our affiliates’ everyday business purposes:</b> Information about your transactions and experiences	No	N/A
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For our nonaffiliates to market to you</b>	No	N/A

<b>To limit our sharing</b>	Call <b>(888) 492-0505</b> <b>Please note:</b> If you are a new client, we can begin sharing your information from the date you received this notice. When you are no longer 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.
<b>Who is providing this notice?</b>	Sound Income Strategies, LLC

<b>WHAT WE DO</b>	
How does Sound Income Strategies, LLC 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 Sound Income Strategies, LLC collect my 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 I limit all sharing of my personal information?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes- information about your creditworthiness</li> <li>• Affiliates from using your information to market to you.</li> <li>• Sharing for non-affiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing.
<b>DEFINITIONS</b>	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none"> <li>• Scranton Financial Group, LLC</li> <li>• Sound Income Group</li> <li>• Advisors Academy</li> <li>• Retirement Income Source</li> </ul>
Non-Affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. <ul style="list-style-type: none"> <li>• Charles Schwab</li> <li>• Fidelity</li> <li>• Red Black</li> <li>• Redtail CRM</li> </ul>
Joint Marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>• None</li> </ul>
<b>Other important information</b>	

<b>Questions?</b>	Call (888) 492.0505
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