

Lifestyle Financial Network, LLC

Our Commitment to Privacy

At our firm protecting your privacy is very important to us. We value your trust and we want you to understand what information we collect, how we protect it, and how we use it. Providing superior products and services to our clients often requires us to obtain various types of personal information. When you entrust your business to us, we understand that you expect your personal information to remain private and to be treated with the utmost confidence. Please be assured we are committed to safeguarding your privacy and have established a policy to maintain the confidentiality of your personal information. We think it is important for you to understand how we obtain, use, and protect your personal information.

How we obtain, disclose and protect your personal information

Information we obtain

The information we obtain will depend upon the scope of the engagement for the financial services you request. In order to render the best possible service within the area(s) you desire, we may obtain personal information as it relates to the following: cash management, insurance, taxes, investments, retirement, and/or your estate. We may receive this information from you during a consultation, in writing, by telephone, by electronic submission, on an application or other forms. This may include personal and household information such as your name, address, date of birth, social security number, income, spending habits, investment objectives, investment experience, financial goals, statements of account, and other records concerning your financial condition and assets. Additional information concerning employee benefits and retirement plan interests, wills, trusts, mortgages and tax returns are sometimes necessary. For some areas of service, additional personal information may be needed such as, a government issued identification, medical history, insurance coverage, insurance premiums and data used to prepare a tax return. Our firm collects your personal information in order to provide the services which you desire.

Information we maintain includes:

- Information we receive from you on financial inventories through consultation,
- Information developed as part of financial plans, analyses or investment advisory services,
- Information concerning investment advisory account transactions,
- Information about your financial products and service transactions with us and,
- Tax information and tax returns prepared by our firm.

Information we disclose

To administer, manage and service your accounts; process transactions and provide related services for your accounts, it is necessary for us to provide access to your personal information within our firm and to companies such as our broker/dealer, Securities America, Inc. We may also share any personal information about you to other broker/dealers, other investment advisors such as Securities America Advisors, Inc., investment companies, insurance companies, trust companies, custodians and other financial companies as necessary for these parties to help us service or process your transactions. When necessary, we may also share your personal information with your attorneys and/or your accountants. We may also share your personal information, as permitted by law, to government entities, consumer reporting agencies or other third parties in response to subpoenas.

Information we protect

We restrict access to your personal information to those representatives and employees of our firm who need the information to perform their job responsibilities and to service your needs. We maintain agreements, as well as physical, electronic and procedural security measures that comply with federal regulations to safeguard your personal information.

We treat personal information -- nonpublic information that identifies you -- with respect, and in accordance with this Privacy Policy.

We do not sell or otherwise provide lists of our clients to third parties to market non-financial services.

If you close an account with our firm, we will continue to operate in accordance with the principles stated in this Privacy Policy.

You can rest assured that you are carefully protected by a privacy policy that totally respects your confidentiality. If you have questions concerning any of the above information, please give our office a call, 205.871.2265.

Fee-Based Planning & Advice for Everyday Life

Securities offered through Securities America Inc., Member FINRA/SIPC, C. Reed Terry, Registered Representative. Advisory services offered through Securities America Advisors, Inc., C. Reed Terry, Investment Advisor Representative. LifeStyle Financial Network, LLC and the Securities America companies are not affiliated. Securities America, Inc. or Securities America Advisors, Inc. does not offer tax or legal advice.