

SG Financial Advisors, LLC

Privacy Notice

SG Financial Advisors, LLC (“SGFA”), is a fee-only financial planning and investment advisory firm. We offer personalized and objective investment management and financial planning services to help our clients identify and achieve their personal financial goals. SGFA protects the privacy of its clients.

Nonpublic Personal Information

“Nonpublic personal information” is nonpublic information about you that we obtain in connection with providing a financial product or service to you.

To conduct regular business, SGFA may collect nonpublic personal information about you from sources such as:

- Information reported by you on applications or other forms you provide us,
- Information about your transactions with us, our affiliates, or others.

SGFA shares nonpublic information solely to service our client accounts. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted by law, or as necessary to provide our authorized services, or with the client’s consent. We will never sell your personal information to anyone.

At times, we may disclose nonpublic personal information to financial service providers such as mortgage brokers or insurance companies with your consent for the purpose of obtaining a product for your benefit.

Information Safeguarding

SGFA will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.

Contact Information

A copy of our firm’s complete Privacy Policy is available upon request. You may obtain it in person at our office or by making a written request delivered via mail or email to Russell E. Wood (wood@sgfinancialadvisors.com); 333 Sandy Springs Circle, #121, Atlanta, GA 30328.