

## PRIVACY NOTICE

Pathways Advisory Group, Inc.  
684 West Cromwell Avenue, Suite 103  
Fresno, CA 93711

Pathways Advisory Group, Inc., an independent financial planning firm, is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information that we collect from you in connection with any of the services provided by Pathways Advisory Group, Inc. We have never disclosed information to nonaffiliated third parties, except as permitted by law, and do not anticipate doing so in the future. If we were to anticipate such a change in firm policy, we would be prohibited under the law from doing so without advising you first. As you know, we use health and financial information that you provide to us to help you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy. Our policy with respect to personal information about you is listed below.

- We restrict access to your personal account information to those employees who have a business or professional reason for knowing. We disclose information to nonaffiliated third parties only as permitted by law. (For example, Federal regulations permit us to share a limited amount of information about you with a brokerage firm in order to execute securities transactions on your behalf, or so that our firm can discuss your financial situation with your accountant or lawyer, with your permission.)
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- The categories of nonpublic personal information that we collect from a client depend upon the scope of the client engagement. It will include information about your personal finances, information about your health to the extent that it is needed for the planning process, and information about transactions between you and third parties.
- For unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted under law.
- We do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose.
- Pathways Advisory Group, Inc. is aware that confidentiality of information is extremely important to our clients.

Please call if you have any questions about our Privacy Policy.

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When clients begin a relationship with Pathways Advisory Group, Inc., they receive a copy of our disclosure document, Form ADV Part 2. If you would like a copy of the most recent version, please call.