

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 current, prospective, and former clients. We hold all personal information in the strictest confidence. 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 first advising you. Our policy with respect to personal information about you is listed below.

- In the course of providing you with advisory services, we may collect, retain, and use client information for the purpose of processing your transactions, maintaining your account(s), discussing your financial situation with your accountant or attorney (with your permission), and complying with legal and regulatory requirements. This information may include Social Security numbers, income, investment experience, risk tolerance, retirement assets, transfer instructions, and information about your health, to the extent that it is needed for the planning process. We restrict access to those employees who have a business or professional reason for knowing.
- We do not sell, exchange, nor disclose client information with outside organizations unless the third party is essential in administering our operations or except as required or permitted by law.
- 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.
- To further safeguard client information digitally, we maintain a secure office and computer environment, using password protected systems, updated anti-virus and anti-spyware software, and encrypted hardware and software firewalls to ensure that your information is not placed at unreasonable risk.
- Pathways Advisory Group, Inc. is aware that confidentiality is extremely important to our clients.

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

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.