

# Interactive Financial Advisors Privacy Notice

-No Action Required-

Interactive Financial Advisors ("IFA") believes it is essential that we maintain the privacy of nonpublic personal information that you provide to us and that we obtain in connection with providing our products and services to you.

## Information We Collect

IFA limits the use, collection, and retention of such information to what we believe is necessary or useful to conduct our business, provide quality service, and offer products, services, and other opportunities that may be of interest to you, our customer. Information collected about you may include, but is not limited to your name, address, telephone number, tax identification number, date of birth, employment status, annual income, and net worth.

In providing products and services to you, we collect nonpublic personal information about you from these sources:

1. Investment/insurance applications, new account forms and other forms and agreements;
2. Transactions with us, our clearing firm, or other chosen investment sponsors; and
3. Other various materials we may use to put forth an appropriate recommendation or to fill a service request.

## What Information We Disclose

We do not disclose the nonpublic personal information we collect about you to anyone except: (i) in furtherance of our business relationship with you and then only to those persons necessary to effect the transactions and provide the services that you authorize, such as broker-dealers, custodians, independent managers, etc.; (ii) to persons assessing our compliance with industry standards (e.g., professional licensing authorities, etc.); (iii) our attorneys, accountants, and auditors; or (iv) as otherwise provided by law.

We are permitted by law to disclose the nonpublic personal information about you to governmental agencies and other third parties in certain circumstances. We may disclose all of the information we collect to affiliates or third party companies that perform marketing services on our behalf or to other financial institutions with whom we have joint marketing agreements.

Our affiliates include OrganizAmerica and UniFinancial. If your financial advisor's affiliation with us ends and the advisor joins another financial services company, your advisor may be permitted to contact you by using information limited to your name, address, email address, phone number and account title.

## Safeguards for Protecting your Privacy

If you decide to close your account(s) or to become an inactive client, we will continue to adhere to the privacy policies and practices as described in this notice, as may be amended from time to time.

We further restrict access to nonpublic personal information about you to those investment advisor representatives ("IARs") and employees who need to know that information to provide our products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

If you have questions about this privacy policy, please call Michael Scherrman at (800) 261-1660, ext. 203.

**Interactive Financial Advisors, Inc.**  
**100 Batson Court, Suite 104**  
**New Lenox, IL 60451**

Dated 7/31/22