

# BARKER

FINANCIAL GROUP, INC.

Strategic Wealth Management Advisors

## 2024 Privacy Policy Notice

Facts	WHAT DOES BARKER FINANCIAL GROUP, INC., DO WITH YOUR PERSONAL AND FINANCIAL INFORMATION?	
Why?	Financial services companies choose how they share your personal and financial information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal and financial information. Please read this notice carefully to understand what we do.	
What?	The types of personal and financial information we collect, and share depend on the service you have with us. This information can include: <ul style="list-style-type: none"><li>Names, addresses, email addresses, Social Security numbers, and income amounts</li><li>Account numbers, balances, and assets</li><li>Transaction history</li></ul>	
How?	All financial services companies need to share customers’ personal and financial information to run their everyday business. In the section below, we list the reasons financial services companies can share their customers’ personal and financial information; the reasons Barker Financial Group, Inc. chooses to share; and whether you can limit this sharing.	
Reasons we can share your personal information	Does Barker share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transaction(s), maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	Yes
For our marketing purposes - to offer our services to you	Yes	Yes
For joint marketing with other financial services companies	No	We do not share
For our affiliates’ everyday business purposes - information about your transactions and experiences	No	We do not share
For our affiliates’ everyday business purposes - information about your creditworthiness	No	We do not share
For non-affiliates to market to you	No	We do not share

<b>Who is providing this notice?</b>	Barker Financial Group, Inc. 10 South Main Street, Suite 104 Topsfield, MA 01983 Phone: 781-743-2600 or 800-356-7066 Website: <a href="http://www.BarkerFG.com">www.BarkerFG.com</a>
<b>What we do</b>	
<b>How does Barker Financial Group, Inc. protect my personal and financial information?</b>	To protect your personal and financial information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
<b>How does Barker Financial Group, Inc. collect my personal and financial information?</b>	<p>We collect your personal and financial information, for example, when you:</p> <ul style="list-style-type: none"> <li>• Open an account or accounts.</li> <li>• Deposit money into your account(s)</li> <li>• Seek advice about your investments.</li> <li>• Enter into an investment advisory contract.</li> <li>• Tell us about your investments, retirement portfolio or earnings.</li> </ul> <p>We also collect your personal and financial information from other companies when you provide us with information, or you provide us with permission to obtain information.</p>
<b>Definitions</b>	
<b>Affiliates</b>	<p>Companies related by common ownership and control. They can be financial services and non-financial services companies.</p> <ul style="list-style-type: none"> <li>• We do not have affiliates, so we do not share your personal and financial information.</li> </ul>
<b>Non-affiliates</b>	<p>Companies not related by common ownership and control. They can be financial services or non-financial services companies.</p> <ul style="list-style-type: none"> <li>• We do not share your personal and financial information with non-affiliates.</li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between non-affiliated financial services companies that together market financial products or service to you.</p> <ul style="list-style-type: none"> <li>• We do not jointly market, so we do not share your personal or financial information.</li> </ul>