
PSC FINANCIAL, LLC
A Registered Investment Advisor

Privacy Policy

Our Commitment to You

PSC Financial, LLC is committed to maintaining the trust and confidence of our clients. We want you to understand how we protect your privacy when we collect and use personal information in the course of business, as well as the measures we take to safeguard your information. Please read this notice carefully to understand what we do.

What does PSC Financial do with your Personal Information?

Financial companies choose how they share your personal 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 information.

The types of personal information we collect can include:

- Social Security Number
- Investment experience
- Income
- Account transactions
- Assets
- Retirement assets

Reasons we can share your Personal Information

For our everyday business purposes.

Such as to process and service your transactions, report on transactions, maintain your account(s), respond to court orders, regulatory and legal investigations, or report to credit bureaus.

For our marketing purposes.

We do not share information with our affiliates or other non-affiliated third parties to offer you products and services without your consent.

To work with other financial companies.

Federal and certain state laws give us the right to share your information with banks, credit unions, retirement plans and other financial institution programs with which you are a customer and where a formal agreement exists between us and them to provide financial products or services to you. We may share information with these financial companies where necessary to service your accounts.

How does PSC Financial protect your Personal Information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and offices.

Employees are trained in the proper handling of personal information. We require companies that help provide our services to you to protect the confidentiality of personal information they receive.

How does PSC Financial collect your Personal Information?

- Open an account
- Apply for insurance
- Seek advice about your investments
- Enter into an investment advisory agreement
- Tell us about your investment portfolio
- Tell us about your retirement portfolio

Opt-Out Provision

It is not a policy of PSC Financial to share nonpublic personal and financial information with affiliated or unaffiliated third parties except under the circumstances noted above. Since sharing personal information is necessary to service client accounts, or is mandated by law, there are no allowances made for clients to opt out.

Please contact our office at 952-777-3955 or 1-844-413-1691 if you have any questions.