

Facts	What does Walsh Financial Solutions do with your personal information?
Why?	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. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information that we collect can include:</p> <ul style="list-style-type: none"> • Social Security number • Income • Assets • Investment experience • Account transactions • Retirement assets <p>When you are no longer our customer, we will continue to hold your information and share it as described in this notice.</p>
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons why financial companies can share their customers' personal information, the reasons that Walsh Financial Solutions chooses to share personal information, and whether you can limit this sharing.

Reasons we can share your personal information:	Does Walsh Financial Solutions share?	Can you limit this sharing?
For our everyday business purposes, such as: to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
For our marketing purposes, to offer our products and services to you	NO	We do not share
For joint marketing with other financial 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 our affiliates to market to you	NO	We do not share
For our non-affiliates to market to you	NO	We do not share

Questions?	Call (303) 252-0852
------------	---------------------

Who we are:	
Who is providing this notice?	Walsh Financial Solutions, LLC
What we do:	
How does Walsh Financial Solutions protect my 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 buildings.
How does Walsh Financial Solutions collect my personal information?	We collect your personal information, for example, when you: <ul style="list-style-type: none"> • Open an account • Apply for insurance • Seek advice about your finances or investments • Enter into a Client Service Agreement • Tell us about your investment or retirement portfolio We also collect your personal information from other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
Definitions:	
Affiliates	Companies related by common ownership or control. They can be financial or nonfinancial companies. <ul style="list-style-type: none"> • Walsh Financial Solutions has no affiliates
Non-affiliates	Companies not related by common ownership or control. They can be financial or nonfinancial companies. <ul style="list-style-type: none"> • Walsh Financial Solutions does not share with non-affiliates so that they can market to you
Joint marketing	A formal agreement between nonaffiliated financial companies that, together, market financial products or services to you. <ul style="list-style-type: none"> • Walsh Financial Solutions does not jointly market
Important information:	