

FACTS

WHAT DOES Finanxial Investment Advisor, Corp (“FIA”) 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?

The types of personal information we collect, and share depend on the product or service you have with us. This information can include:

Name and address

- Social Security number and income
- Account balances and transaction history
- Assets, investment experience, risk tolerance and account transactions
- Retirement assets, checking account information, and employment information
- Payment history

How?

All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons FIA chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does FIA 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	Yes	No
For joint marketing with other financial companies	No	We don’t share
For our affiliates’ everyday business purposes information about your transactions and experiences	Yes	No
For our non-investment services affiliates’ everyday business purposes— information about your transactions and experiences	Yes	Yes
For our affiliates’ everyday business purposes— information about your creditworthiness	No	We don’t share
For our affiliates to market to you	No	We don’t share
For nonaffiliates to market to you	No	We don’t share

To limit our sharing

Call 787-758-8234

Visit us online www.finanxial.net

or mail the **form** below

Please note:

If you are a *new* customer, we can begin sharing your information [30] days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

Questions?

Call 787-758-8234 or go to www.finanxial.net

Mail-in Form

Mark to limit:

- Do not share information about my transactions and experiences with non-investment services affiliates’ everyday business purposes

Name

Address

City, State, Zip

[Account #]

Mail to:

Finanxial Investment Advisors, Corp
 Urb San Francisco
 121 Ave De Diego
 San Juan, PR 00927

Who we are	
Who is providing this notice?	Finanxial Investment Advisors, Corp (“FIA”)
What we do	
How does FIA 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 FIA collect my personal information?	<ul style="list-style-type: none"> • We collect your personal information, for example, when you • Enter into an investment advisory contract or service agreement • Open an account or give us your income information • Tell us about your investment or retirement portfolio or deposit money • Seek financial planning • Provide employment information
Why can’t I limit all sharing?	<p>Federal law gives you the right to limit only</p> <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 nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing. If you have questions, please contact us.</p>
What happens when I limit sharing for an account, I hold jointly with someone else?	Your choices will apply to everyone on your account.
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <p>Our affiliates include: Finanxial Asset Management, Corp, Finanxial Insurance Corp, Finanxial Corp, FX Advisors, LLC, Finanxial Fx LLC, Finanxial IT, Corp, Fx It Software, Inc, NMA Certified Public Accountants, PSC</p>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <p>Our non-affiliate business partner: Buckingham Strategic Partners, LLC and any other business that you are acquiring an investment or financial product</p>
Joint marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <p>FIA does not jointly market</p>
Other important information	
If you have questions, please contact us at 787-758-8234 or visit our website	