

FACTS**WHAT DOES Responsive Financial Group, Inc. (RFG) 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 we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ■ Social Security number and date of birth ■ Address and state or federal ID information ■ Telephone and email address <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
How?	All financial companies need to share required personal information to run their everyday business. In the section below, we list the reasons financial companies can share their required personal information; the reasons RFG chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does RFG 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	NA
For joint marketing with other financial companies	No	NA
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	NA
For nonaffiliates to market to you	No	NA

Questions?	Call 847-670-8000 or go to ben@rfgweb.com
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Who we are

Who is providing this notice?

Responsive Financial Group, Inc. (RFG)

What we do

How does RFG 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 RFG collect my personal information?

We collect your personal information, for example, when you

- Engage Us or Open Accounts with a Custodian
- Complete a Financial Plan or Enroll in a Retirement Plan
- Provide Documents for Planning or Retention Purposes

- enter into contracts or services agreements with financial product or services providers with our assistance

Why can't I limit all sharing?

Federal law gives you the right to limit only

- 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

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 and nonfinancial companies.

- *RCB Phoenix Inc. - RFG Leases space from RCB Phoenix, Inc.*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Schwab Inc., TD Ameritrade, DPL Financial Partners, and Sage Scholars Inc. are examples,*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *None*

Other important information

We only share information where doing so is required by Federal or State Law enforcement or courts, applicable regulatory bodies, and as required to provide services, advice and benefits to our clients.