

## **SYKES FINANCIAL SERVICES Privacy Notice 2022**

Maintaining the security and confidentiality of information we accumulate about our clients is a top priority at Sykes Financial Services. We will protect all information collected about you, and we will restrict access to your nonpublic personal information by maintaining physical, electronic, and procedural safeguards. The policy presented below covers Client Information. Client Information means information personally identifiable with a specific client or about a client's current or former relationship with Sykes Financial Services. This policy is provided to you in accordance with the Federal Financial Privacy Laws and applies to the following entities:

Brokered Benefits, Inc., DBA Sykes Financial Services, a Registered Investment Advisory Firm.

**PROTECTING YOUR INFORMATION, SYKES FINANCIAL SERVICES DOES NOT SELL OUR CLIENT INFORMATION TO ANYONE. WE WILL ONLY SHARE CLIENT INFORMATION WITHIN OUR ORGANIZATION, UNLESS WE PROVIDE YOU WITH ADDITIONAL NOTICE OR ASK FOR YOUR PERMISSION, OR AS DIRECTED BY LAW. ABOVE ALL, WE VALUE YOUR TRUST AND CONFIDENCE IN OUR ABILITY TO MANAGE AND PROTECT YOUR IMPORTANT PERSONAL INFORMATION. YOU HAVE OUR WORD THAT WE WILL PROTECT YOUR INFORMATION AS IF IT WERE OUR OWN.**

### **INFORMATION WE COLLECT:**

Sykes Financial Services collects and uses various types of information to service your accounts, save you time and money, and better understand your needs. We strive to help you learn more about Sykes Financial Services and any products and services that may be of interest to you.

The Client Information we collect and store generally consists of the following:

1. Information gathered from applications, forms and other information you provide us, whether in writing, in person, by telephone, electronically or by any other means, such as your name, address, social security number, assets, income and debt;
2. Information about your transactions and your account experience with Sykes Financial Services, such as your account balances, trading activity, investment history, and parties to transactions.

### **MAKING SURE INFORMATION IS ACCURATE:**

Keeping your account information accurate and up to date is very important. We will provide you with update opportunities at least one time each year. If your account information is ever inaccurate, incomplete or in need of updating, please contact us in writing, in person, by telephone, or electronically. If you have questions or ever feel that we have not handled your information properly, you may contact us and we will provide an answer or investigate your complaint.

### **DISCLOSING INFORMATION IN OTHER SITUATIONS:**

We may also disclose Client Information we maintain about you to your attorney, CPA or tax preparer, with your permission (either oral or written), or as authorized by law.

### **OUR FORMER CLIENTS:**

Even if you are no longer a Sykes Financial Services client, our privacy policy will continue to apply to you. It is our privilege to assist you with your life planning needs. Your comments and suggestions are encouraged, so that we may better serve you.