



Privacy Disclosure Document

Protecting client privacy is a primary goal of Comperio Retirement Consulting, Inc. To conduct regular business, we may collect nonpublic information from sources such as:

- Information reported by you on applications or other forms you provide us.
- Information about transactions with us, our affiliates, and others.

As Comperio Retirement Consulting, Inc. shares nonpublic information solely to service clients, we do not disclose any nonpublic information about our current, former, or prospective clients to anyone, except as permitted by law.

Information Safeguarding

Comperio Retirement Consulting, Inc. will internally safeguard clients' nonpublic information by restricting access to only those employees who need access to this information to provide services. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.