



Beacon Financial Advisory LLC

PRIVACY NOTICE

Beacon Financial Advisory LLC., (referred to as "Beacon Financial Advisory") maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients' nonpublic personal information ("information"). Through this policy and its underlying procedures, Beacon Financial Advisory attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of Beacon Financial Advisory to restrict access to all current and former clients' information (i.e., information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services in furtherance of the client's engagement of Beacon Financial Advisory. In that regard, Beacon Financial Advisory may disclose the client's information: (1) to individuals and/or entities not affiliated with Beacon Financial Advisory, including, but not limited to the client's other professional advisors and/or certain service providers that may be recommended or engaged by Beacon Financial Advisory in furtherance of the client's engagement of Beacon Financial Advisory (i.e., attorney, accountant, insurance agent, broker-dealer, investment adviser, account custodian, record keeper, proxy management service provider, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing and/or transmittal by Beacon Financial Advisory to facilitate the commencement/continuation/termination of a business relationship between the client and/or between Beacon Financial Advisory and a nonaffiliated third party service provider (i.e., broker-dealer, investment adviser, account custodian, record keeper, insurance company, etc.), including, but not limited to, information contained in any document completed and/or executed by the client in furtherance of the client's engagement of Beacon Financial Advisory (i.e., advisory agreement, client information form, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

What You Can Do: For your protection, we recommend that you do not provide your personally identifiable information or website credentials to anyone. Do not send, via unsecure email, any documents/text containing personally identifiable information. If you believe the confidentiality of your personal and/or account information has been compromised or you become aware of any suspicious activity relating to your account, please contact our Chief Compliance Officer at 216.910.1850. If you have questions about our policy or require additional copies of this notice, please call your financial adviser. You can also print a version of this privacy notice from our website at www.beaconplanners.com.

Trusted Contact Person: By completing a physical or electronic contact form or providing Trusted Contact Person (TCP) information to your financial advisor for electronic capture, you authorize us, although not obligated, to contact the TCP(s) and disclose information about your account(s) to that person(s) in the following circumstances: to address possible financial exploitation or fraud, to confirm the specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee or holder of a power of attorney, or in cases where we have been asked to conduct activity in your account and we have a reasonable belief that you may be the subject of financial exploitation. The TCP must be age 18 or older and we recommend it not be someone already authorized to transact business on your account(s). Naming someone a TCP does not allow that person to transact business on your behalf, nor to receive your confidential information regarding account holdings, such as account numbers, values, balances, etc. We also advise that you name two TCPs in the event one of the TCPs is unavailable. You may change your TCP(s) at any time by notifying us or your financial advisor. The TCP(s) provided will apply to all your accounts held with us.

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