



Privacy Policy

Colorado Financial Service Corporation's primary client goal is to protect our client's privacy.

Colorado Financial Service Corporation ("CFSC") collects nonpublic personal information about you from the following sources:

- Information CFSC, receives from clients on applications (name, social security number, address, assets, etc.);
- Information about client transactions with our firm or other firms (account information, payment history, parties to transactions, etc.).

We may disclose information for customers and/or former customers, as necessary, to affiliated and non-affiliated companies that perform certain administrative or record keeping services on our behalf or to other financial institutions with whom we have joint marketing agreements such as mutual fund companies, or as required by law. It is the policy of CFSC that registered representatives of CFSC are allowed to retain client information should he or she elect to move their registration to another broker-dealer.

As CFSC, shares non-public information solely to service our client accounts, we do not disclose nonpublic personal information about our customers or former customers, except as permitted by law.

If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

CFSC will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.