



MFG Wealth Management, Inc.
...Building Confident Tomorrows®

April 22, 2024

RE: MFG Wealth Management, Inc. – 2024 Privacy Principles

Dear Client,

In an effort to keep you informed about the protection of your personal financial information, we are enclosing a copy of the **MFG Wealth Management, Inc.** policies and procedures we have adopted regarding the use and protection of your confidential information.

At **MFG Wealth Management, Inc.**, maintaining the trust and confidence of our clients is a high priority. That is why we want you to understand how we protect your privacy when we collect and use information about you, and the steps we take to safeguard that information. A detailed explanation of our policy is provided for you in the enclosed ***Client Information Privacy Principles***.

Please read this information carefully. If you have any questions regarding our policy, please contact us using the information provided in the notice.

We appreciate your business and look forward to helping you with your investment needs.

Sincerely,



Terri Kontney
Senior Administrative Assistant

MFG Wealth Management, Inc.
Client Information Privacy Principles

At **MFG Wealth Management, Inc.**, our client's personal and financial information will be handled confidentially. We have access to a variety of products and services including investments, insurance, and online banking. To deliver these products and services effectively and conveniently, we use technology to manage and maintain certain client information.

The safeguarding of client information is an issue we take seriously at **MFG Wealth Management, Inc.** To affirm our continuing commitment to the proper use of client information, we have set forth the following Privacy Principles.

1. **Use, Collection, and Retention of Client Information:** We limit the use, collection, and retention of client information to what we believe is necessary to conduct our business, provide quality service, and offer products, services, and other opportunities that may be of interest to our clients. Information collected may include, but is not limited to: name, address, telephone number, tax identification number, date of birth, employment status, annual income, and net worth.
2. **Maintenance of Accurate Information:** We recognize that we must also maintain accurate client records. Therefore, we have established procedures to maintain the accuracy of client information and to keep such information current and complete. These procedures include responding to requests to correct inaccurate information in a timely manner.
3. **Limiting Employee Access to Information:** We limit employee access to personally identifiable client information to those with a business reason to know such information. Employees are educated on the importance of maintaining the confidentiality of client information and on these Privacy Principles. Because of the importance of these issues, all **MFG Wealth Management, Inc.** employees are responsible for maintaining the confidentiality of client information.
4. **Protection of Information via Established Security Procedures:** We recognize that a fundamental element of maintaining effective client privacy procedures is to provide reasonable protection against the unauthorized access to client information. Therefore, we have established appropriate security standards and procedures to guard against any unauthorized access to client information.
5. **Restrictions on the Disclosure of Client Information:** When it comes to sharing client information with unaffiliated companies, **MFG Wealth Management, Inc.** limits who receives specific information about client's accounts and other personally identifiable data. We may share information with such companies if they provide a product or service that may benefit our clients. Whenever we do this, we carefully review the company and the product or service to make sure that it provides value to our clients.

We share the minimum amount of information necessary for that company to offer its product or service. We may also share information with unaffiliated companies that assist us in providing our products and services to our clients, in the normal course of our business, when legally required and at the request or with the permission of a client.

6. **Maintaining Client Privacy in Business Relationships with Third Parties:** If we provide personally identifiable client information to a third party with which we have a business relationship, we will insist that the third party keep such information confidential, consistent with the conduct of our business relationship.
7. **Disclosure of Privacy Principles to Clients:** **MFG Wealth Management, Inc.** wants our client's to understand our commitment to privacy in our use of client information. As a result of our commitment, we have developed these Privacy Principles which are made readily available to our clients. If you have questions pertaining to this notice, please contact, Terri Kontney at 317-780-1006 or terrik@mfgwealthmgmt.com.

These Privacy Principles apply to individuals, and we reserve the right to change these Privacy Principles, and any of the policies or procedures described above, at any time without prior notice but in the event there is a change, we will notify you. These Privacy Principles are for general guidance and do not constitute a contract or create legal rights and do not modify or amend any agreements we have with our clients.