

FACTS	WHAT DOES GIA FINANCIAL DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> • Date of birth, Social Security number, and other government-issued identification number • Assets, income, and financial goals • Account balances and transaction information
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons GIA Financial chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does GIA Share?	Can you limit sharing?
For our everyday business purposes: such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes: to offer our products and services to you	No	We do not share
For joint marketing with other financial companies	No	We do not share
For our affiliates' everyday business purposes: information about your transactions and experiences	No	We do not share
For our affiliates' everyday business purposes: information about your creditworthiness	No	We do not share
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share

To limit	Call our Compliance Department at 419.636.1141 or Mail the form below Please note: If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
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Questions?	Call 419.636.1141
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Mail-in Form										
Leave Blank -or- [If you have a joint account your choice(s) will apply to everyone on your account unless you mark below.] <input type="checkbox"/> Apply my choices only to me	Mark any/all you want to limit: <input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes. <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.									
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; background-color: #d9e1f2;">Name</td> <td style="width: 70%;"></td> </tr> <tr> <td style="background-color: #d9e1f2;">Address</td> <td></td> </tr> <tr> <td style="background-color: #d9e1f2;">City, State, Zip</td> <td></td> </tr> <tr> <td style="background-color: #d9e1f2;">[Account #]</td> <td></td> </tr> </table>	Name		Address		City, State, Zip		[Account #]		Mail to: GIA Financial 208 North Lynn Street Bryan OH 43506
Name										
Address										
City, State, Zip										
[Account #]										

Who we are	
Who is Providing this notice?	GIA Financial

What we do	
How does GIA Protect my personal information	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does GIA Collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • tell us about your financial profile • tell us about an investment or retirement portfolio • open an account or perform transactions • make a wire transfer or tell us where to send money
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes—information about your creditworthiness • affiliates from using your information to market to you • sharing for nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account, unless you tell us otherwise.

Definition	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • Our affiliate is Oberlin Wealth Partners
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • We do not share with nonaffiliates so they can market to you
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • We do not have any joint marketing arrangements