

FACTS**WHAT DOES THE PORTFOLIO STRATEGY GROUP, LLC DO WITH YOUR PERSONAL INFORMATION?**

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| 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? | <p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> ■ Social Security number and Income ■ Account balances and Transaction history ■ Investment experience and Account transactions <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> |
| How? | All financial companies need to share customer personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer personal information; the reasons The Portfolio Strategy Group chooses to share; and whether you can limit this sharing. |

| Reasons we can share your personal information | Does Portfolio Strategy Group, LLC share? | Can you limit this 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 | Yes | No |
| For joint marketing with other financial companies | No | We don't share |
| For our affiliates' everyday business purposes— information about your transactions and experiences | No | We don't share |
| For our affiliates' everyday business purposes— information about your creditworthiness | No | We don't share |
| For nonaffiliates to market to you | No | We don't share |

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| Questions? | Call 914-328-6660 or go to www.portfoliostrategygroup.com |
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Who we are

Who is providing this notice?

The Portfolio Strategy Group, LLC is a registered investment adviser (RIA) with the Securities and Exchange Commission (SEC).

What we do

How does Portfolio Strategy Group 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 Portfolio Strategy Group collect my personal information?

We collect your personal information, for example, when you

- Open an account or give us your income information
- Tell us about your portfolio or deposit money
- Enter into an investment advisory contract with us

We also collect your personal information from other companies.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- 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

State laws and individual companies may give you additional rights to limit sharing.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- *The Portfolio Strategy Group shares nonpublic personal information with its parent company affiliate Focus Financial Partners, LLC for its internal and external auditing purposes.*

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Non-affiliates that we share with can include companies that aggregate data for reporting purposes.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- *The Portfolio Strategy Group does not jointly market.*

Other important information

The Portfolio Strategy Group is an affiliate of Focus Financial Partners, LLC and we and other affiliates of Focus share certain of your personal information with an unaffiliated third party for the purpose of aggregating it and providing summary information based on this data to our parent company Focus.