

Privacy Notice

At Global Financial, Inc. we recognize that our relationship with you is based on integrity and trust. And as part of that rapport, we want you to understand that in order to provide our services and solutions to you we must collect and use Personal Information about you. This information is also referred to as Personally Identifiable Information (PII). This Privacy Notice describes policies and practices about how we utilize and protect PII related to the insurance and financial products and services you receive from us.

We protect your Personal Information by:

- Using security measures including physical, electronic, and procedural safeguards that prevent unauthorized access to, or use of, your PII in accordance with state and federal regulations;
- Training our staff to safeguard PII, and by restricting access to Personal Information to those employees who need it only to perform their job functions.

Personal Information we may collect:

The types of PII we may collect depends on the type of product or service you have or are seeking with us and includes but may not be limited to:

- Information that you provide to us on applications and forms, during conversations with us or our representatives, or when you visit our website (for example your name, date of birth, Social Security number, income, household details, physical and mailing addresses and other contact information);
- Information about your transactions with us including account details and transactional history;
- Information related to government agencies and/or insurance companies handling your business.

We are authorized to collect PII from you for the purpose of assisting you with selecting the products and services you need.

We may share Personal Information we collect, as described above, with:

- Representatives who provide our products and services to you.
- Affiliated entities such as insurance companies that underwrite the products and solutions you obtain.
- Government agencies in response to their requests or as procedurally required in your business transactions with us.

Important Privacy Choices

Global Financial, Inc. respects your privacy choices and understands that you have the right not to provide us with Personal Information. However, if you opt not to provide us with Personal Information, this may preclude us from carrying out our job functions effectively and we reserve the right to withhold assistance under those circumstances.

If you wish to review or amend your Personal Information stored with us, please send your signed written request to 4151 Southwest Freeway, Suite 508 in Houston, Texas 77027. Allow seven (7) business days to process your request from the time your request is received in our office.

If you have any questions or concerns about this Privacy Notice, you may write to us at Inquiries@GlobalFinancialTX.com or call (713) 714-4688.