

FACTS

WHAT DOES THE RETIREMENT SOLUTIONS, INC. (“TRS”) 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"> ■ Name, address, and contact information ■ Social Security number and/or driver’s license, passport, or other government ID number ■ Employment information, account balances, transaction history, and credit history ■ Income and assets
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 TRS chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does TRS 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	Yes
For joint marketing with other financial companies	No	n/a
For our affiliates’ everyday business purposes— information about your transactions and experiences	No	n/a
For our affiliates’ everyday business purposes— information about your creditworthiness	No	n/a
For our affiliates to market to you	No	n/a
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call one of our offices: <ul style="list-style-type: none"> • Redmond Office: 425-558-3700 • Mill Creek Office: 425-412-8952 • Tri-Cities Office: 509-581-0249 • Denver Office: 303-974-4978 ■ Visit us online: https://theretirementsolution.com/contact/ or email us at info@trsfamily.com. ■ Mail the form below <p>Please note:</p> <p>If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>
Questions?	Call 888-500-5830 or go to https://theretirementsolution.com/contact/



Mail-in Form		
	Mark any/all you want to limit: <ul style="list-style-type: none"> <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. <input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me. 	
Name		Mail to: The Retirement Solutions, Inc. 18300 Redmond Way,
Address		
City, State, Zip		

Suite 250, Redmond,
WA 98052

DA-002028.1	

Who we are	
Who is providing this notice?	TRS
What we do	
How does TRS 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 TRS collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ■ Open an account or seek advice about your investments ■ Tell us about your investments or retirement portfolio ■ Tell us about your investments or retirements earnings ■ Give us your contact information <p>We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.</p>
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.
Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ■ <i>N/A. TRS has no affiliates.</i>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> ■ <i>TRS only shares information with service providers so that it may provide the services offered.</i>
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"> ■ <i>TRS does not share information with nonaffiliated financial companies for purposes of joint marketing.</i>
Other important information	
Our general privacy policy at https://theretirementolution.com/privacy-policy-notice/ explains our practices regarding other types of your personal information.	

