



Wealth through ingenuity.

CMG Capital Management Group, Inc. PRIVACY POLICY

CMG Capital Management Group, Inc. (“CMG”) maintains physical, electronic and procedural safeguards that comply with federal standards to protect its clients’ non-public personal information (“information”). Through this policy and its underlying procedures, CMG attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of CMG to restrict access to all current and former clients’ information (i.e., information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/non-affiliated entities who need to know that information in order to provide products or services to the client. CMG may disclose clients’ information if CMG is: (1) previously authorized to disclose the information to individuals and/or entities not affiliated with CMG, including, but not limited to, clients’ other professional advisors and/or service providers (i.e., attorney, accountant, insurance agent, broker dealer, investment advisor, account custodian, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing or transmittal by CMG in order to facilitate the commencement/continuation/termination of a business relationship between the client and a non-affiliated third party service provider (i.e., broker dealer, investment advisor, account custodian, insurance company, etc.), including information contained in any document completed and/or executed by the client for CMG (i.e., advisory agreement, client information form, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding non-affiliated third party service provider.

CMG permits only authorized employees and affiliates who have signed a copy of CMG’s Privacy Policy to have access to client information. Employees violating CMG’s Privacy Policy will be subject to CMG’s disciplinary process. Additionally, whenever CMG hires other organizations to provide services to CMG’s clients, CMG will require them to sign Confidentiality Agreements and/or Privacy Policy.

Should you have any questions regarding the above, please contact CMG’s Chief Compliance Officer, PJ Grzywacz, at 610-989-9090.

CAPITAL MANAGEMENT GROUP

1000 Continental Drive 800.891.9092
Suite 570 610.989.9090
King of Prussia, PA 19406 610.989.9092 fax

www.cmgwealth.com