



CORPORATE HEADQUARTERS
602 North Front St., Wormleysburg, PA 17043

LANCASTER OFFICE
26A East Roseville Rd., Lancaster, PA 17601

YORK OFFICE
1550 E Market Street, York, PA 17403

PRIVACY POLICY NOTICE

Stonebridge Financial Group, LLC has adopted this policy with recognition that protecting the privacy and security of the personal information we obtain about our customers is an important responsibility. We also know that you expect us to service you in an accurate and efficient manner. To do so, we must collect and maintain certain personal information about you. We want you to know what information we collect and how we use and safeguard that information.

WHAT INFORMATION WE COLLECT

We collect certain nonpublic personal identifying information about you (such as your name, address, social security number, etc.) from information that you provide on applications or other forms as well as communications (electronic, telephone, written or in person) with you or your authorized representatives (such as your attorney, accountant, etc.). We also collect information about your brokerage accounts and transactions (such as purchases, sales, account balances, inquiries, etc.).

WHAT INFORMATION WE DISCLOSE

We do not sell, share, or disclose your nonpublic personal information to non-affiliated third party financial companies. We will not disclose the nonpublic personal information we collect about our customers to anyone except as necessary as follows: (i) in furtherance of our business relationship with them and then only to those persons necessary to effect the transactions and provide the services that they authorize (such as broker-dealers, custodians, independent managers etc.); (ii) to persons assessing our compliance with industry standards (e.g., professional licensing authorities, etc.); (iii) our attorneys, accountants, and auditors; or (iv) as otherwise provided by law. Text message opt-in data and consent are not shared with any third parties (including subsidiaries and affiliates). If you wish to be removed from receiving future communications, text STOP to opt out. We are permitted by law to disclose the nonpublic personal information about you to governmental agencies and other third parties in certain circumstances (such as third parties that perform administrative or marketing services on our behalf or for joint marketing programs), however we will not do so. These third parties are prohibited to use or share the information for any other purpose. If you decide at some point to either terminate our services or become an inactive customer, we will continue to adhere to our privacy policy, as may be amended from time to time.

SECURITY OF YOUR INFORMATION

We restrict access to your nonpublic personal information to those employees who need to know that information to service your account. We maintain physical, electronic and procedural safeguards that comply with applicable federal or state standards to protect your nonpublic personal information.

CHANGES TO OUR PRIVACY POLICY OR RELATIONSHIP WITH YOU

Our policy about obtaining and disclosing information may change from time to time. We will provide you notice of any material change to this policy before we implement the change.

V2-2025

Phone: 855.366.9776

Website: stonebridgefg.com

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Advisory products and services offered by Investment Advisory Representatives through Stonebridge Financial Group, an SEC-Registered Investment Advisor. HR & Payroll services are provided by Stonebridge HR Solutions dba Stonebridge Payroll Solutions. Stonebridge Financial Group may transact business in states where it is registered, exempt or excluded from registration. Securities offered by Registered Representatives through Private Client Services, Member FINRA/SIPC. Private Client Services and Stonebridge Financial Group are unaffiliated entities. Stonebridge HR Solutions is a subsidiary of Stonebridge Financial Group.