

# Privacy Statement - ElderAdo Financial

Reviewed February 13, 2026

## **Our Commitment to Your Privacy**

Elderado Financial Inc. ("EFI") is committed to safeguarding the confidentiality of our clients' nonpublic personal information in accordance with applicable federal and state laws, including Regulation S-P. We maintain reasonable and appropriate administrative, technical, and physical safeguards designed to protect your information.

## **Information We Collect**

We collect nonpublic personal information about you in connection with providing investment advisory services. This may include:

- **Identifiers:** name, address, telephone number, email address, Social Security number, date of birth
- **Financial Information:** income, assets, account balances, transaction history, investment objectives
- **Documents & Communications:** applications, agreements, correspondence, and other information you provide
- **Information from third parties:** custodians, attorneys, accountants, or other financial institutions, as necessary to service your account

If you interact with our website, we may collect limited technical information such as IP address or information submitted through online forms.

## **How We Use and Share Information**

We use your information solely to provide advisory services and administer your accounts.

We may share your information:

1. With our custodian (currently Charles Schwab & Co., Inc.) and other service providers necessary to operate and service your accounts.
2. With your authorized professionals (such as attorneys or accountants) at your direction or as necessary to fulfill your planning needs.
3. As required or permitted by law, including in response to legal process or to help prevent fraud or other unlawful activity.

We do not sell client information. Service providers are expected to maintain confidentiality and use information only for permitted purposes. SMS consent and phone numbers are not shared with third parties for marketing purposes.

## **Safeguarding Your Information**

We maintain physical safeguards (secured offices and file storage), administrative safeguards (restricted access, confidentiality agreements, employee training), and technical safeguards (secure systems, encryption, and access controls) to protect your information.

## **Your Rights and Record Retention**

You may request access to the personal information we maintain about you and request corrections if needed. We retain records as required by applicable securities laws and securely dispose of information when no longer required.

This policy applies to current and former clients.

If you have questions, please contact us at 970-249-9900 or [info@elderadofinancial.com](mailto:info@elderadofinancial.com)