FACTS

WHAT DOES CALLAHAN FINANCIAL PLANNING DO WITH YOUR PERSONAL INFORMATION?

Callahan Financial Planning

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:

- Social Security number and date of birth
- Phone numbers, e-mail and physical addresses
- Investment account transactions, risk tolerance and net worth values
- Your employment and other personal information applicable to financial planning

When you are no longer our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share their client's personal information to run their everyday business. In the section below, we list reasons financial companies can share their client's personal information; the reasons Callahan Financial Planning chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Callahan Financial Planning 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**	**We don't share**
For our affiliates' everyday business purposes - information about your transaction and experience	**No**	**N/A**
For our affiliates' everyday business purposes - specific personal information about yourself	**No**	**N/A**
For nonaffiliates to market to you	**No**	**We don't share**

Questions?

Call (402) 341-2000, visit https://callahanplanning.com, or write us at 3157 Farnam Street Suite 7111, Omaha, NE 68131

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Who we are	
Who is providing this notice?	You are receiving this notice from Callahan Financial Planning Company, a provider of personal financial planning services.

What we do	
How does Callahan Financial Planning protect my personal information?	To protect you 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 Callahan Financial Planning collect my personal information?	We collect your personal information, for example, when you: • request personal financial planning services • have engaged our firm to manage your plan and/or portfolio • know someone who has requested personal financial services from us and has named you as a related party
Why can't I limit all sharing?	Federal law gives you the right to limit only: • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Callahan Financial Planning Company does not have any affiliate companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. Callahan Financial Planning Company does not share your information with nonaffiliates for the purpose of marketing.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

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