



Stewardship Advisory Group

WEALTH MANAGEMENT

ESTATE PLANNING

LEGACY COACHING*

Privacy Policy

Note: This Privacy Policy applies to individuals who have requested the Free Retirement Toolkit and not to those investors who have opted to become investment advisory clients of Stewardship Advisory Group, LLC

Information We Collect: In order for us to supply you with the requested services, we collect certain personal information about you that you voluntarily provide to us. This information includes your contact details, such as your name, email address and phone number.

Information we Disclose: In order to provide you with the requested services we share your information as needed to fulfill the purpose of the requested services and as permitted by applicable law. We may share your personal information within our organization, upon request from law enforcement or regulators, but also using tools and technology we employ in order to send you ongoing information via text message.

Our Security Policy: Only those individuals who need it to perform their jobs are authorized to have access to confidential client information. We maintain physical, electronic, and procedural security measures that comply with applicable state and federal regulations to safeguard confidential Client information.

Cancellation: You may, at any time, request that we stop sending you text messages or other communications. If you do so, we will remove your information from the tools and technology employed to send you text messages and communications and cease sending the information to you.

Changes to this Privacy Policy. If we make any substantial changes in the way confidential information is used or disseminated, we will notify the Client.

If Client has any questions concerning this privacy policy, please write to us at 17011 SR 50, Suite 203, Clermont, FL 34711.

*Jeff Rogers is an Investment Advisor Representative offering Financial Planning and Investment Advisory services through Stewardship Advisory Group, LLC; an SEC Registered Investment Advisor. * Legacy Coaching services are offered through Stewardship Legacy Coaching, LLC. Securities are offered through United Planners Financial Services, a Limited Partnership, Member FINRA, SIPC. Stewardship Advisory Group, LLC and Stewardship Legacy Coaching, LLC are not affiliated with United Planners Financial Services.*

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