



PRIVACY NOTICE

Concordia Group prioritizes the privacy of its existing and prospective clients and is committed to maintaining the confidentiality, integrity, and security of their personal information.

COLLECTION AND DISCLOSURE OF NON-PUBLIC PERSONAL INFORMATION

We collect non-public personal information about our clients and prospects, such as their name, address, contact details, investment needs and goals. We may disclose all of this information to certain third parties under one or more of these circumstances:

(i) As authorized by our clients, if they request the disclosure of the information to third parties; and (ii) As required by law or requested by regulators.

SECURITY OF NON-PUBLIC INFORMATION

Concordia Group restricts access to non-public personal information about its clients to those employees who need to know that information to provide related services. We maintain physical, electronic, and procedural safeguards to guard our clients' non-public personal information.

This Privacy Notice sets forth our policies with respect to non-public personal information of our clients, prospective clients and former clients. These policies may be changed at any time.