

FACTS

WHAT DOES PACIFIC EDGE ADVISORS, LLC DO WITH YOUR PERSONAL INFORMATION?

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:

- Information we receive from you on account applications, such as your address, date of birth, Social Security Number,
- Occupation and financial goals;
- Assets and income
- Information about your transactions with us, our affiliates, or others.

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 customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons **Pacific Edge Advisors, LLC** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Pacific Edge Advisors, LLC 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	No	No
For joint marketing with other financial companies	No	No
For our affiliates' everyday business purposes— information about your transactions and experiences	No	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	No
For our affiliates to market to you	No	No
For non-affiliates to market to you	No	No

To limit our sharing

- Call **949-718-4527**
- Visit us online: PacificEdgeAdvisors.com or
- Mail the **form** below.

Please note:

If you are a *new* customer, we can begin sharing your information 10 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

Who we are

Who is providing this notice?

Pacific Edge Advisors, LLC

What we do

How does Pacific Edge Advisors, LLC protect my personal information?

To protect your 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.

We restrict access to nonpublic personal information about you to those individuals who need to know that information to provide products or services to you and perform their respective duties. We maintain physical, electronic, and procedural security measures to safeguard confidential client information.

How does Pacific Edge Advisors, LLC collect my personal information?

We collect your personal information, for example, when you

- open an account or seek financial or tax advice
- direct us to buy securities or direct us to sell your securities
- enter into an investment advisory contract

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

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account—unless you tell us otherwise.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- **Pacific Edge does not have any affiliates**

Non-affiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- **Pacific Edge does not have any non-affiliates.**

Joint marketing

A formal agreement between non-affiliated financial companies that together market financial products or services to you.

- **Pacific Edge does not have any joint marketing arrangements**

Other important information

We periodically review our policies and practices to protect your nonpublic private information and will provide notice of changes in our information sharing practices.



Mail-in Form

**Leave Blank
OR
If you have a
joint account,
your choice(s)
will apply to
everyone on
your account
unless you mark
below**

**Apply my
choices only
to me**

Mark any/all you want to limit:

- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with non-affiliates to market their products and services to me.

Name

Address

City, State, Zip

Mail to:

**Pacific Edge
Advisors, LLC
2101 E. Coast
Hwy., Suite 215
Corona Del Mar,
CA 92625**