JFR Financial Services, Inc.
Privacy Statement

JFR Financial Services, Inc. is committed to protect the privacy and security of the personal information that we collect about our clients. This notice is intended to help you understand how we collect, handle and safeguard that information. Federal law gives consumers the right to limit some but not all information sharing. The same laws require us to inform you of how your personal information is collected, shared and protected. The types of personal information that we may collect include:

- Social Security Number
- Assets
- Debt
- Liquid Net Worth
- Address
- Driver's License Number
- Retirement Assets
- Investment Experience
- Trusts, Wills, POA's
- Phone Number
- Annual Income
- Investment Experience
- Net Worth
- Date of Birth
- Employer

All financial companies need to share customers' personal information in order to conduct business. The list below explains reasons why data is shared and whether or not you can limit our sharing.

Reasons We Can Share Your Personal Information	Does JFR Financial Share this?	Can You Limit This Sharing?
Our everyday business purposes, to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	YES	NO
Marketing – To offer services to you	NO	N/A
Joint marketing with other financial companies	YES	NO
Everyday business purposes for our affiliates' regarding your transactions and experiences	YES	NO
Everyday business purposes for our affiliates' regarding your creditworthiness	NO	We don't share
For non-affiliates to market to you – for clients with accounts established with LaSalle St. Securities, LLC (LSS) and/or Fidelity/NFS	NO	We don't share
Non-affiliates to market to you. Example, should we choose to change broker/dealers we may share your info with a new broker unless you instruct us not to.	YES	YES

JFR Financial Services, Inc. collects your personal information when you: open a new account, apply for any kind of insurance, enter into an investment advisory account, review your personal data as needed to create a financial plan for you, update compliance required profiles and whenever you seek financial advice. Your information is shared with our affiliates, investment and insurance companies only to complete applications and to maintain accounts.

JFR Financial Services, Inc. protects your personal information from unauthorized access by utilizing. security measures on our computers, files and storage. The back-up system we utilize is also safeguarded to comply with federal regulations.

John F. Robbins, President and Chief Compliance Officer

December 2024