



Privacy Policy

As of January 1, 2025

BilkeyKatz Investment Consultants, Inc. (BilkeyKatz) respects your right to privacy. Please read this notice carefully to understand what we do in this regard.

Facts		WHAT DOES BILKEYKATZ 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: <ul style="list-style-type: none"> • EIN (or Social Security number, if applicable) and income • account balances, transaction history and assets 	
How?	All financial companies need to share customer's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer's personal information; the limited reasons BilkeyKatz chooses to share; and whether you can limit this sharing.	

Reasons we can share your personal information	Does BilkeyKatz share?	Can you limit this sharing?
For our everyday business purposes - such as information required to provide consulting services, maintain your account(s), or respond to court orders and legal investigations	YES	NO
For our marketing purposes - to offer our products and services to you	NO	
For joint marketing with other financial companies	NO	
For our affiliates' everyday business purposes - information about your transactions and experiences	NO	
For nonaffiliates to market to you	NO	

What we do	
How does BilkeyKatz protect my personal information?	<p>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.</p> <p>Access to your information is only granted to employees and third party service providers contracted to assist in the servicing of your accounts.</p>

How does BilkeyKatz collect my personal information?	We collect your personal information, for example, when you engage our services. We also could collect your personal information from other companies.
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes— information about your creditworthiness • affiliates from using your information to market to you • sharing for nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>

Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <p style="text-align: center;"><i>BilkeyKatz has no affiliates.</i></p>
Nonaffiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <p style="text-align: center;"><i>BilkeyKatz does not share with nonaffiliates so they can market to you.</i></p>
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <p style="text-align: center;"><i>BilkeyKatz does not jointly market.</i></p>

We will continually review our Privacy Policy and monitor our business practices to help ensure our clients' privacy. Should a change to our Privacy Policy be required, we will promptly notify our clients in writing.