



TRANSPARENCY

We're committed to transparency.

We are proud to share information about our company and give you straight answers to all your questions. Whether you want more information about CFSG and its management team, the borrowing and investing process, news and updates, or help with specific issues, we'll get you the information you need.

Company Information is available.

If you are looking for more information about CFSG that is not on our site, feel free to contact us via castleberryfinancialservices.com and we'll do our best to point you in the right direction.

Transparent, yet we protect your privacy.

Yes, we are committed to transparency, but that does not mean your privacy is less important. We take extra measures to ensure your identity and privacy are protected. Read more about our [Privacy Policy](#).

Our commitment to good corporate governance.

We are committed to promoting high standards of honest and ethical business conduct and compliance with applicable laws, rules, and regulations. Please see our [Code of Conduct and Ethics and Whistleblower and Complaint Policy](#) on our [Corporate Governance](#) page.



AUTHORIZATION FOR AUTOMATIC PAYMENTS

Interest Payments/ Authorization for Automatic Payments

Once your account is funded, you hereby authorize CFSG, as the wealth management servicer on your investment and its successors and assigns, to initiate electronic funds transfers from your designated account listed above for monthly payments on your interest. EACH MONTH, THE INTEREST AMOUNT WILL BE YOUR MONTHLY PAYMENT AMOUNT. UNLESS YOU CHOSE QUARTERLY OR ANNUALLY.

With regard to interest payments made by automatic payment, you have the right to stop payment of automatic payments or revoke your prior authorization for automatic payments by notifying us at least three (3) banking days before the scheduled date of transfer. You understand this authorization will remain in effect until your contract expires.



WHAT DOES CFSG DO WITH YOUR PERSONAL INFORMATION?

<p><i>Why?</i></p>	<p>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.</p> <p><i>Please read this notice carefully to understand what we do.</i></p>
<p><i>What?</i></p>	<p>The types of personal information we collect depends on the service you have with us. We collect personal information during the membership and/or application process and from credit bureaus.</p> <p>This information can include your:</p> <ul style="list-style-type: none"> <input type="checkbox"/> social security number <input type="checkbox"/> email address <input type="checkbox"/> income <input type="checkbox"/> date of birth <input type="checkbox"/> address and telephone number <input type="checkbox"/> account information <input type="checkbox"/> credit history and credit score <input type="checkbox"/> credit card or other debt information
<p><i>How?</i></p>	<p>CFSG does not share the nonpublic personal information provided by current or former customers to affiliates or nonaffiliated third parties, except as required by law. CFSG does share certain credit and financial information of borrowers, as required <input type="checkbox"/> by the Securities & Exchange Commission.</p>
<p><i>How does CFSG protect my personal</i></p>	<p>To protect your personal information from unauthorized access, CFSG has adopted a specific policy on safeguarding customer information in addition to our general information security policy. CFSG stores all sensitive financial data in a secure, remote, SAS 70 environment.</p>
<p><i>Privacy information?</i></p>	<p>CFSG's privacy policy can be found at castleberryfinancialservices.com</p>