



G. A. Repple & Company Privacy Policy

FACTS

What Does G. A. Repple & Company 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.

What?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number
- Income
- Account balances
- Transaction history
- Investment experience
- Assets

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 G. A. Repple chooses to share; and whether you can limit this sharing.

Reasons We Can Share Your Personal Information

- **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
→ Does GAR share? **Yes**
→ Can you limit this sharing? **No**
- **For our marketing purposes** – to offer our products and services to you
→ Does GAR share? **Yes**
→ Can you limit this sharing? **No**



G. A. Repple & Company Privacy Policy

- **For joint marketing with other financial companies**
 - Does GAR share? **Yes**
 - Can you limit this sharing? **No**
- **For our affiliates to market to you**
 - Does GAR share? **No**
 - Can you limit this sharing? **We don't share**
- **For our affiliates' everyday business purposes (information about your creditworthiness)**
 - Does GAR share? **No**
 - Can you limit this sharing? **We don't share**
- **For nonaffiliates to market to you**
 - Does GAR share? **No**
 - Can you limit this sharing? **We don't share**

To Limit Our Sharing

- Call us at: **407-404-9090**
- Mail your request to:
G. A. Repple & Company
101 Normandy Road
Casselberry, FL 32707

Please note:

If you are a new customer, we can begin sharing your information 30 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.

Questions?

Call: **407-339-9090**

Email: clientservices@garepple.com

A copy of this and other important disclosures can be found at
<https://www.garepple.com/disclosures/>

What We Do

How does GAR 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.



G. A. Repple & Company Privacy Policy

We also maintain **administrative, technical, and physical safeguards**, including monitoring systems, access controls, and a formal incident response program designed to detect, respond to, and recover from cybersecurity incidents.

If we determine that your nonpublic personal information has been accessed or used without authorization, we will notify you **as soon as practicable, but no later than 30 days after such determination**, unless a delay is requested by law enforcement.

How does GAR collect my personal information?

We collect your personal information, for example, when you:

- Open an account
- Apply for insurance
- Enter into an investment advisory relationship
- Provide financial or investment information
- Seek advice about your investments

We also collect your personal information from others, such as:

- Credit bureaus
- Affiliates
- Other financial institutions

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 nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

Definitions

Affiliates

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



G. A. Repple & Company Privacy Policy

Nonaffiliates

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

Joint Marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Other Important Information

California Residents

In accordance with California law, we will not share information we collect about you with nonaffiliated third parties, except as permitted by law.

Vermont Residents

We will not disclose information about your creditworthiness to our affiliates and will not disclose your personal information to nonaffiliated third parties to market to you, except as permitted by Vermont law

Nevada Residents

You may request to be placed on our internal "Do Not Call" list at any time by contacting us at **407-404-2365**. You may also contact the Nevada Attorney General for more information.

Alaska Residents

If your financial advisor leaves our firm, we will not share your personal information with the new firm without your prior written consent.

Additional Disclosures

We do not sell your personal information to anyone.

We may share your personal information as permitted by law, including with service providers, custodians, affiliates, and regulators.

We require third-party service providers to safeguard your information and notify us promptly of any unauthorized access or use.

We maintain records of our privacy practices, incident response actions, and compliance efforts in accordance with applicable laws and regulations, including SEC Regulation S-P.

Privacy Policy

Opt-In/Opt-Out Mail-In Form

Privacy Choices Notice

(To be used by clients of G. A. Repple & Company)

If you would like to limit the personal information that your financial advisor/registered representative could disclose or take if he or she moved to another brokerage or investment advisory firm and terminated the relationship with G. A. Repple & Company, please complete and mail the following form to:

G. A. Repple & Company
101 Normandy Road
Casselberry, FL 32707

You can withdraw your opt-out choice at any time by contacting us in writing at the address provided above.

If your primary address is in a state that requires your affirmative consent to share your personal information with the New Firm (such as Alaska), then you must give your written consent before we will allow your financial advisor/registered representative to take any of your personal information to that New Firm.

In order for your opt-out election to be effective, you must complete ALL of the following information and check accordingly to opt-in or opt-out based on the state in which you reside:

Instructions: If you want to make a selection, please check only one box and sign below to complete your privacy choice. You are not required to check either box if you do not want to take any action.

- Opt-In: Check here (For residents of the following states: Alaska, California, or Vermont) to give permission to G.A. Repple & Company to share your personal information with third-parties according to its privacy practices described herein. You are not required to Opt-In.
Opt-Out: Check here if you are not a resident of the above-mentioned states and wish to limit the personal information about me that my financial advisor/registered representative could disclose or take if he or she moves to another brokerage or investment advisory firm and terminates the relationship with G. A. Repple & Company. However, I understand that G. A. Repple & Company may disclose my name, address, telephone number, email, and the account title of the accounts serviced by my advisor/registered representative to the new brokerage or investment advisory firm as allowed under federal and certain state laws. You are not required to Opt-Out.

Advisor/Registered Representative's Name: _____

Please note that for accounts held jointly by two or more persons, the privacy choices made by any account holder apply to all joint holders with respect to the account.

Customer 1:

Name (Please print clearly) _____

Address _____

City _____ State/Zip _____

Phone Number _____

Account Number or SSN _____

Signature: _____ Date _____

Customer 2:

Name (Please print clearly) _____

Address _____

City _____ State/Zip _____

Phone Number _____

Account Number or SSN _____

Signature: _____ Date _____