FACTS

WHAT DOES LARSON FINANCIAL HOLDINGS, LLC ("LFH") AND ITS AFFILIATES (collectively, the "Firm") 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: ■ Social Security number and income ■ Account balances and payment history ■ Credit history and credit scores
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 the Firm chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Do LFH and its affiliates 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	YES	YES
For joint marketing with other financial companies	YES	NO
For our affiliates' everyday business purposes— information about your transactions and experiences	YES	NO
For our affiliates' everyday business purposes— information about your creditworthiness	YES	YES
For our affiliates to market to you	YES	YES
For nonaffiliates to market to you	YES	YES

To limit our sharing or marketing to you	■ Phone: (866) 569-2450 ■ Email: compliancedepartment@larson.com (Email Subject Line: "Privacy Notice"). Do not include full account numbers. ■ **Intrua Financial, LLC, Ta-Check Financial, Ltd., and Ta-Check Tax Service customers:** To limit sharing or marketing, email compliance@intrua.com or call (713) 355-9910. ■ Mail: Complete and return the form below. **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. However, you can contact us at any time to limit our sharing.
Questions?	Please use the applicable contact information above.

Mail-in Form

Mark any/all you want to limit:

- ☐ Do not use my personal information to market to me.
- ☐ Do not allow your affiliates to use my personal information to market to me.
- ☐ Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- ☐ Do not share my personal information with nonaffiliates to market their products and services to me.
- ☐ For routing purposes, check this box if your request relates to Intrua Financial, LLC; Ta-Check Financial, Ltd.; or Ta-Check Tax Service.

Name		**Mail to:** Larson Financial Holdings, LLC 100 N. Broadway, Suite 1700 St. Louis, MO 63102-2709
Address		
City, State, Zip		
Last 4 digits of account number(s)		

Who we are	
Who is providing this notice?	Institutions Providing This Notice: Larson Financial Securities, LLC; Larson Financial Group, LLC; Larson Capital Management, LLC; Intrua Financial, LLC; Larson Tax Partners, LLC; Student Loan Professor, LLC; Ta-Check Financial, Ltd.; and Ptacek Tax Service, LLC d/b/a Ta-Check Tax Service.
What we do	
How does the Firm 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 permit approved AI tools to process personal information only under access, confidentiality, security, retention, and human-review controls.
How does the Firm collect my personal information?	We collect your personal information, for example, when you ■ open an account ■ apply for insurance ■ enter into an investment advisory contract ■ seek financial or tax advice ■ give us your contact information We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
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. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions

Affiliates	*Our affiliates include financial companies, such as Larson Financial Securities, LLC; Larson Financial Group, LLC; Larson Capital Management, LLC; Intrua Financial, LLC; Larson Tax Partners, LLC; and Student Loan Professor, LLC. Our non-financial affiliates include Larson Financial Holdings, LLC; Larson Wealth Partners, LLC; Larson Commercial Real Estate, LLC f/k/a MedRealty, LLC; Doctors Only, LLC d/b/a Larson Network Services; Larson Partner Opportunity Zone, LLC; Larson Partner, LLC; Ta-Check Financial, Ltd.; and Ptacek Tax Service, LLC d/b/a Ta-Check Tax Service.*
Nonaffiliates	*Nonaffiliates we share with can include insurance agencies; direct marketing, professional services, and hospitality companies; nonprofit organizations; and PHD Only, LLC d/b/a Doctors Only.*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ■ *Our joint marketing partners include broker-dealers, investment advisers, insurance agencies, and other financial companies.*

Other important information

- **For California residents:** We will not share your personal information with nonaffiliated third parties so they can market their products or services to you unless you provide the separate consent required by California law. We will limit sharing among our companies to the extent required by California law. California residents may have additional rights under the California Consumer Privacy Act. For information about the personal information we collect, how we use and disclose it, and how to exercise your applicable California privacy rights, please review the California privacy section of our Privacy Policy at https://www.larson.com/privacy-policy/ or contact us by calling (866) 569-2450, emailing compliancedepartment@larson.com, or writing to Larson Financial Holdings, LLC, 100 N. Broadway, Suite 1700, St. Louis, MO 63102. We may contact you for additional information to verify your identity and the validity of your request. Customers of Intrua Financial, LLC, Ta-Check Financial, Ltd., and Ta-Check Tax Service may use the entity-specific contact information provided below.
- **For Vermont residents:** In accordance with Vermont law, we will not share information we collect about you with companies outside of our corporate family, except as permitted by law, including, for example with your consent or to service your account. We will not share information about your creditworthiness within our corporate family except with your authorization or consent, but we may share information about our transactions or experiences with you within our corporate family without your consent.
- **For Nevada residents:** We may contact our existing customers by telephone to offer additional financial products that we believe may be of interest to you. You have the right to opt out of these calls by adding your name to our internal do-not-call list. To opt out of these calls, or for more information about your opt-out rights, please contact your advisory team or you can reach us by calling (866) 569-2450, by emailing compliancedepartment@larson.com or writing to Larson Financial Holdings, LLC, 100 N. Broadway, Suite 1700, Saint Louis, MO 63102. You are being provided this notice under Nevada state law. Nevada residents may contact the Nevada Attorney General for more information about their opt-out rights by calling 702-486-3132, emailing aginfo@ag.nv.gov, or writing to: Office of the Nevada Attorney General, Bureau of Consumer Protection, 100 N. Carson Street, Carson City, NV 89701-4717. Customers of Intrua Financial, LLC, Ta-Check Financial, Ltd., and Ta-Check Tax Service may use the entity-specific contact information provided below.
- **For Insurance Customers in AZ, CA, CT, GA, IL, ME, MA, MN, MT, NV, NJ, NC, OH, OR and VA** only**.** The term "Information" in this part means customer information obtained in an insurance transaction. We may give your Information to state insurance officials, law enforcement, group policy holders about claims experience or auditors as the law allows or requires. We may give your Information to insurance support companies that may keep it or give it to others. We may share medical Information so we can learn if you qualify for coverage, process claims or prevent fraud or if you say we can.
- **For Intrua Financial, LLC, Ta-Check Financial, Ltd., and Ta-Check Tax Service:** For questions regarding privacy practices or applicable privacy choices, please visit www.intrua.com/privacy-policy/, call (713) 355-9910, email compliance@intrua.com, or write to Intrua Financial, LLC, Attn: Compliance, 3737 Buffalo Speedway, Suite 400, Houston, TX 77098.