

Privacy Notice

Effective Date: 10/15/2026

This website is operated by Broadridge. It does not use contact forms, create user accounts, process transactions, or intentionally collect personal information from visitors. It also does not use analytics or advertising-tracking technologies. The website's hosting provider may automatically process limited technical information, such as an IP address or security log data, to operate and protect the website.

You may contact me voluntarily using the email address or telephone number displayed on this website. Information you provide during those communications will be used to respond to your inquiry, provide requested services, and meet applicable legal, regulatory, supervisory, and record-keeping obligations.

Please do not send Social Security numbers, account numbers, financial statements, passwords, or other sensitive information through ordinary email. If such information is required, you will be directed to a firm-approved secure method.

Questions about this notice may be directed to:

Gregory, Williams

Email: grwilliams2@financialguide.com

Telephone: 408 352 3965

This notice may be updated periodically. Any revision will be posted here with a new effective date.