



Privacy Policy
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September 2026

Privacy Policy

At Strategy, Inc. dba The Advisors Group (The Firm), protecting your privacy is very important to us. We want you to understand what information we collect and how we use it. We collect and use **Nonpublic Private Information (NPI)** in order to provide our clients with a broad range of tax and financial services. We treat all NPI in accordance with this Privacy Policy.

This document is intended to inform clients, prospective clients, and website visitors of our policies concerning the collection, use, sharing, and disclosure of **Personally Identifiable Information (PII)**.

By using our services, you agree to the collection and use of information by the terms of this policy. The PII collected is used by the firm in providing tax and investment advisory services. The firm will not use or share your information with anyone except as described in this Privacy Policy.

When you are no longer our client, your PII will be securely archived, and we will only share your information as described in this notice. However, you can contact us at any time to limit our sharing.

The firm deploys appropriate safeguards and secures all files and buildings to protect your PII from unauthorized access and use.

Information Collection and Use

The Advisors Group may require you to provide certain **Personally Identifiable Information (PII)**, including but not limited to, your name, phone number, and postal address. This information is used to contact or identify you.

We collect financial and personal information from various sources like applications, worksheets, reporting statements, employment forms and other forms, as well as interviews and conversations with our clients. We may also review banking and credit card information of our clients in the performance of receipt of payment. Under our policy, all information about you will only be provided by you or obtained with your permission.

The nature of our work requires us to collect certain PII about you for business purposes, such as to process your transactions, maintain your account(s), or prepare your tax returns, and the firm may collect, track, and share Social Security numbers, Tax ID's, income, account balances, and credit information.

The firm has procedures and policies in place to protect your PII. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your PII from unauthorized access.

The federal government and some states allow you to limit this collection and sharing. Such limits may prevent our providing necessary services. For more information, or to limit information sharing, contact us at the phone number or email address listed below.

SMS Terms of Service: By opting into SMS communications (*texting*), you agree to receive SMS messages from The Advisors Group. This includes SMS messages for customer care including but not limited to, appointment reminders, requests for data and information to be securely sent, and confirmation of requests from clients. SMS consent is not shared with third parties. Message frequency varies. Message and data rates may apply. You may opt

out of all SMS messaging at any time.

Links to Other Sites

Our website may contain links to other sites that are not operated by us. If you click on a third-party link, you will be directed to that site. The Advisors Group strongly advises you to review the Privacy Policy of these websites, as we have no control over and assume no responsibility for the content, privacy policies, or practices of any third-party sites or services.

Log Data & Cookies

When you visit our company website, the firm will collect information that your browser sends to us called **Log Data**. This Log Data may include information such as your computer's Internet Protocol (IP) address, browser version, pages of our Service that you visit, the time and date of your visit, the time spent on those pages, and other statistics.

Cookies are files with a small amount of data that are commonly used as a unique, anonymous identifier. These are sent to your browser from the website you visit and stored on your computer's hard drive. The Advisors Group's website uses these "cookies" to collect information and to improve our Service. You have the option to either accept or refuse these cookies and know when a cookie is being sent to your computer. If you choose to refuse these cookies, you may not be able to use some portions of the firm's website services.

Third-Parties

The Advisors Group will not routinely disclose your **Personally Identifiable Information (PII)** to a third party without your express permission.

We may share information with third-party companies and individuals due to the following reasons:

- To facilitate our investment advisory services;
- To perform operational-related services;
- To assist us in analyzing how our investment advisory services are used; or
- To provide tax preparation, government filings, and tax planning services.
- Pursuant to law, rules, regulations, standard security industry practices, in connection with a subpoena, discovery request, or other legal/regulatory process compelling the sharing of information.

These third parties will have access to your PII to perform the tasks assigned to them on our behalf. They are not allowed to disclose or use the information for any other purpose.

Use of Artificial Intelligence in Business Operations

We may utilize artificial intelligence (AI) technologies to support and enhance our business operations, including but not limited to client communication, document analysis, compliance monitoring, and internal process automation. These tools are employed to improve service quality, efficiency, and regulatory compliance. AI systems used by our firm do not replace human oversight and are subject to rigorous confidentiality and security protocols to safeguard client data. We do not use AI to make autonomous investment decisions or to share personal information with third parties without your consent, except as permitted or required by law. We remain committed to transparency, data privacy, and compliance with all applicable laws and regulations governing the advisory industry.

Changes to This Privacy Policy

The Advisors Group may update our Privacy Policy at any time, and we will notify you directly and provide an updated copy as well as repost the new policy to our website in a timely manner. We advise you to review the Privacy Policy when it is updated and when it is sent to you annually.

Contact Us

If you have any questions or suggestions about our Privacy Policy, please feel free to contact our Chief Compliance Officer, Shelby Russell by phone at (806) 794-3848 or by email at shelby@theadvisorsgroup.net