



**OXFORD FINANCIAL GROUP, LTD.™ (“OXFORD”)**  
**THE TRUST COMPANY OF OXFORD™**  
**SAVILE ROW BESPOKE SOCIETY, INC.**

revised 10/21

**FACTS**

**WHAT DOES OXFORD DO WITH YOUR PERSONAL INFORMATION?**

<b>How?</b>	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.
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social security number and assets;</li> <li>• Information about your transactions with us, your account balance and investment experience; and</li> <li>• Insurance coverage and wire transfer instructions.</li> </ul> When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.
<b>Why?</b>	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 Oxford chooses to share; and whether you can limit this sharing.

<b>Reasons we can share your personal information</b>	<b>Does Oxford share?</b>	<b>Can you limit this sharing?</b>
<b>For our everyday business purposes –</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations or report to credit bureaus	Yes	No
<b>For our marketing purposes –</b> to offer our products and services to you	No	We do not share
<b>For joint marketing with other financial companies</b>	No	We do not share
<b>For our affiliates’ everyday business purposes –</b> information about your transactions and experiences	Yes	No
<b>For our affiliates’ everyday business purposes –</b> information about your creditworthiness	No	We do not share
<b>For our affiliates to market to you</b>	No	We do not share
<b>For non-affiliates to market to you</b>	No	We do not share

<b>To limit our sharing</b>	We do not currently share your information except as necessary to manage your account or as required by law. <b>Please note:</b> if you are a new investor, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer an investor, we continue to share your information as described in this notice.
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<b>Questions?</b>	Call (317) 805-5089 or go to <a href="https://ofgltd.com/privacy/">https://ofgltd.com/privacy/</a>
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<b>Who we are</b>	
<b>Who is providing this notice?</b>	Oxford Financial Group, Ltd.
<b>What we do</b>	
<b>How does Oxford protect my personal information?</b>	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.
<b>How does Oxford collect my personal information?</b>	We collect your personal information, for example, when you: <ul style="list-style-type: none"> <li>• Complete an investment advisory agreement or other forms</li> <li>• Open an account or seek advice about your investments</li> <li>• Make a wire transfer or direct us to buy securities</li> </ul>
<b>Why can't I limit all sharing?</b>	Federal Law gives you the right to limit only: <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for non-affiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
<b>Definitions</b>	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and non-financial companies. <p><i>Oxford has an affiliated trust company, The Trust Company of Oxford™. Oxford has an affiliated commodity pool operator, Savile Row Bespoke Society, Inc.</i></p>
<b>Non-affiliates</b>	Companies not related by common ownership or control. They can be financial and non-financial companies. <p><i>Oxford does not share with non-affiliates so they can market to you.</i></p>
<b>Joint marketing</b>	A formal agreement between non-affiliated financial companies that together market financial products or services to you. <p><i>Oxford does not jointly market.</i></p>