



Privacy Policy

FACTS	WHAT DOES SAGEOAK FINANCIAL, LLC 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?	<p>The types of personal information we collect and share depend on the type of engagement you have with us. This information can include:</p> <table> <tr> <td>Social Security number and Birth Date</td><td>Assets and Liabilities</td></tr> <tr> <td>Name, address, and phone number</td><td>Income and Expenses</td></tr> <tr> <td>Email address(es)</td><td>Investment Activity</td></tr> <tr> <td>Account information</td><td>Investment experience and goals</td></tr> </table> <p>When you are no longer our client, our Privacy Policy will continue to apply to you, and we will continue to treat your nonpublic information with strict confidentiality. We maintain all records regarding all former clients for the retention period required by law.</p>	Social Security number and Birth Date	Assets and Liabilities	Name, address, and phone number	Income and Expenses	Email address(es)	Investment Activity	Account information	Investment experience and goals
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Name, address, and phone number	Income and Expenses								
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HOW?	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons clients choose to share; and whether you can limit this sharing.								

Reasons we can share your personal information	Do we share?	Can you opt out of this sharing?
For our everyday business purposes - We may share nonpublic personal information with non-affiliated third parties that perform accounting, custodial, recordkeeping, or administrative services related to the service of your account; to governmental regulatory authorities upon request; to law enforcement pursuant to a legal subpoena, dispute, litigation or fraud prevention; or as otherwise permitted by law.	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	N/A
For our affiliates' everyday business purposes - information about your transactions and experiences	No	N/A
For our affiliates' everyday business purposes - information about your creditworthiness	No	N/A
For nonaffiliates to market to you	No	N/A

Questions?	Call (918) 627-3700
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WHAT WE DO	
How does SageOak Financial LLC 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, as well as other physical, electronic, and procedural safeguards.
How does SageOak Financial LLC collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> • Sign an investment advisory agreement • Open an account • Request investment or financial planning advice • Tell us about your investment or retirement portfolio
Why can't I limit all sharing?	<p>Federal and state laws give you the right to limit only:</p> <ul style="list-style-type: none"> • sharing for affiliates' everyday business purposes • affiliates from using your information to market to you • sharing for nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>

DEFINITIONS	
Affiliates	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • None
Non-affiliates	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> • None
Joint marketing	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> • None

Other Important Information