



Privacy Statement

Privacy Policy – Shilanski & Associates, Inc.

Effective Date: May 28, 2025

Shilanski & Associates, Inc. (“we,” “us,” or “our”) is committed to protecting your privacy. This Privacy Policy explains how we collect, use, and protect your personal information.

1. Information We Collect

We collect non-public personal information from:

- Applications & Forms: Name, date of birth, address, phone, email, Social Security number, employment details, income, assets, investment experience, and health information.
- Transactions: Information about your interactions and account activity with us.
- Other Sources: Consumer reporting agencies and unaffiliated third parties.

2. How We Use Your Information

We use your information to:

- Evaluate your financial needs.
- Process transactions and service requests.
- Inform you about relevant products and services.
- Provide customer service and account support.

3. Information Sharing

We do not sell or rent your personal information. We may share your data with:

- Employees & Agents: Only those needing access to support your account.
- Non-Affiliated Third Parties: Including financial service providers (e.g., broker-dealers, fund companies, insurance firms) to fulfill services you've authorized.
- Legal & Regulatory Entities: When required by law or necessary to protect our rights.
- Joint Marketing Partners: To perform services on our behalf, under strict confidentiality standards.
- Mobile Opt-in, SMS consent, and Phone Numbers collected for SMS communication purposes will not be shared with third parties and affiliates for marketing purposes.

All third parties must adhere to our privacy standards.

4. SMS Consent

We may send you SMS messages for appointment reminders. Your consent to receive SMS messages is not shared with third parties for marketing purposes. You can opt out of receiving SMS messages at any time by following the instructions provided in the message or contacting us directly.

If you agree to receive text messages from Shilanski & Associates, Inc. related to conversational purposes. You may reply STOP to opt-out at any time. Reply to HELP for assistance. Messages and data rates may apply. Message frequency will vary.

5. Data Security

We implement appropriate security measures to protect your personal information from unauthorized access, alteration, disclosure, or destruction. However, no method of transmission over the internet or electronic storage is completely secure. We protect your information through:

- Restricted employee access.
- Physical, electronic, and procedural safeguards.
- Compliance with federal and/or state data protection standards.

6. Your Rights

You have the right to:

- Access and review personal data we maintain.
- Request updates or corrections to your information.
- Contact us if you believe any records are inaccurate.

Most information is available via your account statements or service applications.

7. Contact Us

If you have questions about your personal information or this Privacy Policy, please contact us at:

Shilanski & Associates, Inc.

Phone: (907) 278-1351

