

Memo

To:

From: Burkett Financial Services, LLC (BFS)

Date:

Re: Privacy Notice and Form ADV

As required by law we are providing you our privacy notice and an offering of our Form ADV.

This is an annual notice that you will be receiving. Nothing in our services or the methods in which we service you has changed. If you have any questions, please call anyone on the BFS team.

### **PRIVACY NOTICE**

To conduct regular business, we may collect nonpublic personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us, our affiliates, or others

To provide the utmost in service, we may disclose information, as necessary, to other companies, i.e. insurance providers, law firms, CPA firms, banks etc...to perform services in our providing financial planning to you.

#### **Information Safeguarding**

Burkett Financial Services, LLC will internally safeguard your nonpublic personal information by restricting access to only those employees who provide services to you. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.

### **FORM ADV**

Advisers use Form ADV to register as an investment adviser with the Securities Exchange Commission or the state securities regulator where the adviser's principal place of business is located.

Part II of the form includes information on our services and fees. If you would like to receive a copy of our current Form ADV Part II please contact Jeanette Kelly in our Rock Hill office at (803) 980-3232 or toll-free at (888)560-5344.