

Privacy Choices Notice

If you would like to limit the personal information that your financial advisor discloses or takes with him or her to another brokerage or investment advisory firm upon the termination of his or her relationship with WFG Investments, Inc., please complete and mail the following form to:

WFG Investments, Inc.
c/o Compliance Department
2711 N. Haskell Avenue
Suite 2900
Dallas, TX. 75204

- Limit the personal information about me that my financial advisor discloses or takes with him or her to another brokerage or investment advisory firm upon terminating his or her relationship with Williams Financial Group. I understand that you may disclose my name, address, telephone number, email, and the account title of the accounts serviced by my advisor to such brokerage or investment advisory firm.

If you want to follow your advisor to his or her New Firm when he or she terminates their relationship with us, please do not send in this Privacy Choices Notice form.

Customers of banks, credit unions, or other financial institutions with whom we have a joint marketing agreement to provide investment services to you should not send in this form to us.

For your opt-out election to be effective, you must complete ALL of the following information: name, address, account or social security number, signature and date lines.

Customer 1:

Name _____

Address _____

City State/Zip _____

Account Number or SSN _____

Signature _____ Date _____

Customer 2:

Name _____

Address _____

City State/Zip _____

Account Number or SSN _____

Signature _____ Date _____