Rev. 1/2017

WHAT DOES **LAKESIDE WEALTH MANAGEMENT GROUP LLC** DO WITH YOUR PERSONAL INFORMAITON?

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.

The types of personal information we collect and share depends on the product or service you have with us. This information can include:

- Tax identification Number, Date of Birth, Telephone Number and Address
- Annual Income, Tax Bracket, Account Balance and Transaction History
- Net Worth, Assets and Employment History

When you are *no longer* our customer, we continue to share your information as described in this notice.

All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons companies can share their clients' personal information; the reasons Lakeside Wealth Management Group, LLC chooses to share; and whether you can limit this sharing.

Affiliates: Companies related by common ownership or control. They can be financial and nonfinancial companies. *Lakeside Wealth Management Group LLC does not share with affiliates so they can market to you.*

Non-affiliates: Companies not related by common ownership or control. They can be financial and nonfinancial companies.

Lakeside Wealth Management Group LLC shares with First Allied Securities, Inc. because all Lakeside's investment adviser representatives are dually licensed with First Allied. Lakeside also shares with Pershing Advisor Solutions, LLC when a client opens an investment management account because Pershing Advisor Solutions, LLC is the recommended custodian. First Allied Securities, Inc. and Pershing Advisor Solutions, LLC do not market to client.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION

Reasons	Does Lakeside Wealth Management Group, LLC Share?	Can you limit this sharing?
For our everyday business purposes (process transactions, maintain accounts, respond to court orders, and legal investigations, or report to credit bureaus	Yes	No
Marketing	No	We don't share
Joint Marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes	No	We don't share
For non-affiliates to market you	No	We don't share

WHAT WE DO	
How does Lakeside Wealth Management Group 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
How does Lakeside Wealth Management Group LLC collect my personal information?	We collect your personal information, for example, when you • Provide your personal information • Seek Investment Advice • Complete an Application We also collect your personal information from other, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only • Sharing for affiliates' everyday business purposes-information about your creditworthiness • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.