



Privacy Policy

FACTS	WHAT DOES FAHEY RETIREMENT PARTNERS 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?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: • Social Security number and employment information • Retirement assets and account balances • Risk tolerance
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Fahey Retirement Partners chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Fahey Retirement Partners share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	No	No
For our marketing purposes — to offer our products and services to you	No	We don't share
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes — information about your transactions and experiences	No	We don't share
For our affiliates' everyday business purposes — information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

Questions?	Call 319.325.5244 or go to www.gofahey.com
Who we are	
Who is providing this notice?	Fahey Retirement Partners, an investment adviser registered with the State of Wisconsin.

What we do	
How does Fahey Retirement Partners 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. We also limit access to employees and service providers who need your information to serve you, and we require service providers to keep it confidential.



FAHEY RETIREMENT PARTNERS

Retirement Plan Consulting | Fiduciary Investment Services

What we do	
How does Fahey Retirement Partners collect my personal information?	We collect your personal information, for example, when you: • Enter into an investment advisory contract or seek advice about your investments • Tell us about your investment or retirement portfolio • Give us your contact information or provide account information We also collect your personal information from others, such as your plan sponsor, plan recordkeeper, custodian, 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 nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • Fahey Retirement Partners has no affiliates
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • Fahey Retirement Partners does not share with nonaffiliates so they can market to you.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • Fahey Retirement Partners does not jointly market.

Other important information
Retirement plan participants. When we advise an employer-sponsored retirement plan, we may receive information about participants and beneficiaries from the plan sponsor, recordkeeper or third-party administrator. We use it only to serve the plan and its participants under our agreement with the plan sponsor, and we do not sell it or share it for marketing.
Former clients. We treat information about former clients the same way we treat information about current clients.
Delivery of this notice. We provide this notice when you become a client and each year while you remain a client.
State law. You may have additional rights under the laws of the state where you live. Where state law gives you greater protection, we will comply with it.

Effective date: September, 2026 · Fahey Retirement Partners · 115 E Trillium CT, Mequon, WI 53092 · 319.325.5244 · gofahey.com