



**SEASIDE**  
FINANCIAL & INSURANCE SERVICES

## Privacy Policies and Practices Disclosure

Seaside Advisory Services, Inc.,  
dba Seaside Financial & Insurance Services,  
a Registered Investment Advisor  
CRD # 289985

2888 Loker Ave. East, Suite 110  
Carlsbad, CA 92010  
Phone: 760.433.4632

[DarleneM@SeasideAdvisory.com](mailto:DarleneM@SeasideAdvisory.com)



## Privacy Policy

Seaside Advisory Services, LLC dba Seaside Financial & Insurance Services (“Seaside”) is committed to maintaining the confidentiality, integrity, and security of personal information entrusted to us by our clients.

## Information We Collect

We collect nonpublic personal information about you from the following sources:

- Information you provide to us (such as your name, address, Social Security number, income, and assets)
- Information from transactions with us or others
- Information from documents you provide to us in connection with advisory services

## How We Use and Share Information

We use your information to provide advisory services, open and maintain your accounts, and process transactions.

We do **not sell your personal information**.

We may share your information with non-affiliated third parties only as permitted by law, including:

- Custodians, broker-dealers, and service providers
- Firms that assist in servicing your account
- Regulatory authorities as required

All third parties are required to maintain the confidentiality of your information.

## Opt-Out Rights

If you prefer that we limit the sharing of your non-public personal information with non-affiliated third parties, you may opt out of such disclosures (except those permitted by law).

To opt out, please contact us at:

Seaside Advisory Services  
2888 Loker Ave East, Suite 110  
Carlsbad, CA 92010  
(760) 433-4632

## How We Protect Your Information

We maintain physical, electronic, and procedural safeguards designed to protect your personal information, including:

- Restricted access to authorized personnel
- Secure systems and encryption where appropriate
- Confidentiality requirements for employees and service providers

## Regulatory Disclosure

This notice is provided in accordance with the **Gramm-Leach-Bliley Act (GLBA)** and **Regulation S-P** adopted by the U.S. Securities and Exchange Commission.

## Additional Information

If you have any questions regarding this Privacy Policy, please contact us at (760) 433-4632.