



PSA Insurance & Financial Services
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Privacy Policy

Who We Are

Established in 1928, PSA Financial Center is one of the area's largest independent financial services firms. Supported by sophisticated equipment, trained staff and professional advisors, PSA has the ability to analyze the most complex financial situation and arrive at the optimum solution for each client. Our affiliates provide insurance, investments, and financial planning.

Accessing Customer Information

Access to customer information is authorized for business purposes only. It is based on our need to know such information in order to assist your sales representative in providing products or services to you, to fulfill regulatory requirements, or to conduct PSA's business. Employees who have access to customer information are required to protect it and keep it confidential.

Collecting Information to Conduct Business

PSA Financial Center, Inc. and its affiliates collect information about you to help your sales representative serve your financial needs, provide customer service, offer new products or services, and fulfill legal or regulatory requirements. The required information will vary according to the products and services that you request and may include:

- Personal and financial information (name, address, social security number, assets, income*);
- Health information (as required when applying for certain insurance products);
- Information about your relationships with your sales representative (products or services purchased, account balances and payment history); and
- Information from visitors to PSA's website (such as that provided through online forms, site visitor data, and online information collecting devices known as "cookies").

*Changes to this information should be provided to your representative as soon as possible so that we may update your records. Transactions for our Equity and Managed Equity accounts are processed through First Clearing, LLC. Transactions for the No-Load Mutual Fund Managed accounts and the TPA services are generally processed by Schwab Institutional Services, with some accounts held through other entities. For information on your account, please contact your representative.

Safeguarding Privacy

PSA continues to assess new technology in order to provide additional protection of your personal information. We safeguard this information in accordance with federal standards and established security standards and procedures, including the implementation of physical, electronic and procedural safeguards that ensure the safety of customer information.

Sharing information

Your information is not shared with other companies for marketing purposes. In the course of conducting business, we may disclose some or all of this information among our affiliates or with our other service providers, including non-affiliated third parties, as allowed by law, only for the purpose of:

- Providing customer service or account maintenance;
- In response to a subpoena, to prevent fraud, or to comply with an inquiry by a government agency or regulator; and
- To perform services for us or on our behalf.

PSA Financial Products

PSA offers a variety of financial services including Investment Management for Individuals, Corporations, Pensions, and Trusts as well as comprehensive Financial Planning. Personal and Commercial Insurance offerings include Home, Auto, Umbrella, Boat & Recreational Vehicle, Property, General Liability, Workers Compensation and many other options. Our professionals are also available to assist you with Long Term Care, Life, Disability, Group Benefits, Professional Liability and Errors & Omissions insurances, Retirement Planning, and Third Party Administration for Pension Plans.

You, your family, and your business are very important to us. For more information, please call our offices at 410-821-7766.

Affiliated Companies

PSA Financial Advisors, Inc.
Financial Planning,
Investment Management

PSA Financial, Inc.
Employee Benefits

PSA Equities, Inc.
Registered Broker/Dealer
FINRA/SIPC

PSA Professional Liability, Inc.
Medical Malpractice

PSA Consulting Group, Inc.

PSA Insurance, Inc.
Agents & Brokers