



# CORRIGAN FINANCIAL, INC.

## **OFFER OF ANNUAL FORM ADV-PART 2**

We have recently filed our annual updating amendment to Form ADV and Form ADV-Part 2 covering the year ended December 31, 2022. There were no material changes to this document since our previous annual filing for 2021. To request a copy of the Form ADV-Part 2, please contact our office at (401) 849-9313. Form ADV, Form ADV-Part 2, and Form CRS may be viewed at [www.corriganfinancialinc.com](http://www.corriganfinancialinc.com) and at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **IMPORTANT NOTICE CONCERNING OUR CLIENTS' PRIVACY**

Your trust is the most valuable asset of Corrigan Financial, Inc. As technology continues to evolve, it is more important than ever that we assure you that your information is safe with us. We take precautions to protect your privacy by maintaining physical, electronic, and procedural safeguards that comply with Federal and other applicable standards to guard your "nonpublic personal information".

When you provide us, or we obtain, information about you and your accounts that is not publicly available (nonpublic personal information), you can be certain this information will be used only for our financial planning, tax preparation and investment advisory services. We do not provide information to companies for use in telemarketing or direct mail marketing of any products or services.

### **Information We Collect**

We collect nonpublic personally identifiable information about you as described in this section to provide our services. We refer to all of this information as "Client Information".

- Information we receive from you: We may collect your name, address, social security number, family and marital status, investment objectives, financial goals, risk tolerance, and information about your income, assets, investments, liabilities, expenses and personal financial transactions.
- Information we receive from other sources: For investment advisory and financial planning services, we may collect trading and transactional history for your investment advisory account(s) and statements or records from investment firms, tax preparation firms, and other professionals that you have retained and authorized to provide information directly to us.

### **Use and Disclosure of Client Information**

Corrigan Financial, Inc. is committed to the protection and privacy of its clients' personal and financial information. The information we collect is used for only one purpose: to help deliver the

services you have requested easily and efficiently. Corrigan Financial, Inc. will not share such information with any affiliated or nonaffiliated third party except:

- When required to maintain or service a client account;
- With persons acting in a fiduciary or representative capacity on behalf of a client;
- To provide advice and information to help clients meet their financial objectives;
- Provide information about other services of ours that may be of interest;
- To comply with federal, state or local laws, regulations, and other applicable legal requirements;
- In other circumstances with the client's instruction and/or consent.

In order to provide our services, we may disclose Client Information to certain non-affiliated companies that perform services for us ("service providers"), such as companies that provide data processing, performance reports and statements of accounts for assets under management. We require all service providers to have written contracts with us that specify appropriate uses of and procedures for protecting Client Information. Other than these service providers, we do not disclose any nonpublic personal information about our clients to anyone except with your explicit request or permission, as disclosed in this privacy notice, or as required or permitted by law.

#### **Opt-Out Provisions**

It is not a policy of Corrigan Financial, Inc. to share nonpublic personal and financial information with affiliated or nonaffiliated third parties except under the circumstances noted above. Since sharing under the circumstance noted above is necessary to service client accounts or is mandated by law, there are no allowances for clients to opt out.

#### **Safeguarding Client Information**

To protect your personal information from unauthorized access and use, we use various safety measures including computer and electronic transmission safeguards and secured files and office.

#### **Online Services and Privacy**

You can visit our website and learn about our services without providing any information about you. We do not store or retain any information (i.e., "cookies") about you when you visit our website. Currently we do not offer transactional services at our website.

#### **Where to Find Out More Information**

If you have questions or comments about our privacy practices or the way your information is maintained and used, please write to us at Corrigan Financial, Inc., 747 Aquidneck Ave., Middletown, Rhode Island 02842, Attention: Compliance Officer. We are committed to protecting your privacy, whether you do business with us in person, electronically, by telephone, or by mail.