



## PARTNERS IN FINANCIAL PLANNING, LLC

### PRIVACY NOTICE

Partners in Financial Planning, LLC (referred to as “PIFP”) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients’ nonpublic personal information (“information”). Through this policy and its underlying procedures, PIFP attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of PIFP to restrict access to all current and former clients’ information (i.e., information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services to the client. PIFP may disclose the client’s information if PIFP is: (1) previously authorized to disclose the information to individuals and/or entities not affiliated with PIFP, including, but not limited to the client’s other professional advisors and/or service providers (i.e., attorney, accountant, insurance agent, broker-dealer, investment adviser, account custodian, etc.); (2) required to do so by judicial or regulatory process; or (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. The disclosure of information contained in any document completed by the client for processing and/or transmittal by PIFP in order to facilitate the commencement/continuation/termination of a business relationship between the client and a nonaffiliated third party service provider (i.e., broker-dealer, investment adviser, account custodian, insurance company, etc.), including information contained in any document completed and/or executed by the client for PIFP (i.e., advisory agreement, client information form, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

PIFP permits only authorized employees and affiliates who have signed a copy of PIFP’s Privacy Policy to have access to client information. Employees violating PIFP’s Privacy Policy will be subject to PIFP’s disciplinary process. Additionally, whenever PIFP hires other organizations to provide services to PIFP’s clients, PIFP will require them to sign confidentiality agreements and/or the Privacy Policy.

Should you have any questions regarding the above, please contact Pamela D. Poldiak, Chief Compliance Officer.