Privacy Policy Notice

Life Planning Partners, Inc. has adopted this privacy policy with recognition that protecting the privacy and security of the personal information we obtain about you is an important responsibility. We also know that you expect us to work with you in an accurate and efficient manner. To do so, we must collect and maintain certain personal information.

We want you to know what information we collect, how we safeguard it, and how we share it.

Information We Collect: We collect certain non-public information about you ("Client Information"). The essential purpose for collecting Client Information is to allow us to provide financial planning and advisory services to you. Client Information we collect may include:

- Information that you provide on applications or other forms or information you provide during our discussions. This Client Information may include personal and household information such as income, spending habits, investment objectives, financial goals, statements of account, and other records concerning your financial condition and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages and tax returns.
- Identifying information such as your name, age, address, social security number, etc.
- Information about your transactions with us, or others (e.g., custodians, clearing firms, banks, etc.).
- Information we may receive from consumer reporting agencies (e.g., credit bureaus), as well as other various materials we may use to provide an appropriate recommendation or to fill a service request.

Security of Your Information: ***We protect your information within the firm.*** We restrict access to your Client Information to those employees who need to know that information to service your account. We maintain physical, electronic and procedural safeguards that comply with applicable federal or state standards to protect your non-public personal information.

Information We Disclose: ***We disclose information about you only to help us work with you or as required by law.*** We disclose Client Information we collect: (i) to persons necessary to effect the transactions and provide the services that you authorize, such as broker-dealers, custodians, independent managers etc.; (ii) to persons assessing our compliance with industry standards (e.g., professional licensing authorities, etc.); (iii) our attorneys, accountants, and auditors; or (iv) as otherwise provided by law including in response to a properly executed governmental request.

We disclose Client Information to other third parties that perform administrative or operational services on our behalf. These third parties are an extension of our staff and help us more effectively provide our ongoing services to you. They are prohibited from using or sharing the information for any other purpose and must adhere to the same privacy rules and regulations as we do.

We also disclose personal Client Information to non-affiliated third parties to effect services, quote coverage, or review accounting, insurance, and/or legal service options. The non-affiliated third parties to whom we disclose this information may include: CPAs, Insurance Agents, and/or Attorneys.

Opt Out Right: If you prefer that we not disclose non-public personal information about you to CPAs, Insurance Agents, and/or Attorneys to effect services, quote coverage or review accounting, insurance, and/or legal service options, you may direct us not to make disclosures outside those otherwise permitted by law, as described herein. If you wish to opt out of disclosures to CPAs, Insurance Agents, Attorneys to effect services, quote coverage or review service options, call our main number, 904-448-5158, and ask to speak to Tim Utecht. You can also complete the section below and hand or fax a copy of this document to 866-807-6894 or email us at info@lifeplanningpartners.com.

_____ I do not want you to share my non-public personal information with non-affiliated parties (other than with those required or permitted by law, as described herein).

Signature: ____ Date: ____________

Printed Name:____

Former Clients: If you decide to stop working with us, we will continue to adhere to our privacy policies, which may be amended from time to time.

Changes to Our Privacy Policy: Except as required or permitted by law, as described herein, we do not otherwise share confidential information about you with non-affiliated third parties. In the unlikely event there were to be a change in this fundamental policy, we will provide written notice to you. Where applicable, you would be given an opportunity to limit or opt-out of such sharing arrangements.

Questions: If you have questions about this privacy notice or about the privacy of your client information, call our main number, 904-448-5158, and ask to speak to Tim Utecht or email us at info@lifeplanningpartners.com.