

Customer Privacy Policy

- Certified Financial Planner Directory values your business and the confidence that you place in us. Protecting the privacy and confidentiality of your nonpublic personal information is of the highest importance to the way we conduct our business.
- We want you to be aware of the kinds of information that we collect about you and how it is used.
- Kinds of nonpublic information we collect:
 - Information that you provide on applications, forms, and other correspondence, or information that you give us verbally.
 - Data such as your name, social security number, address, assets, income, date of birth, and occupation.
 - Transactional information such as your account numbers, account balances, transaction details, and other financial information. This can include transactions with us, our affiliates, or other entities.
 - Third-party information about you, such as data provided by your broker, financial planner, or other professional who you hire.

How we limit and control use of your information

In order to protect your privacy, we carefully control how information about you is shared with other parties.

- We do not disclose nonpublic personal information about you, *except* as permitted or required by law. The law permits us to share information about investors with our affiliates, advisors, sub advisors, transfer of agents, broker/dealers, administrators, or any firms involved in providing the products and services you receive from us. However, these parties are not permitted to release, use, or transfer your information to anyone else.
- Our employees and contractors must adhere to strict policies and procedures to prevent any misuses of your nonpublic personal information. Employees are bound by this privacy policy and are educated on implementing security principles and practices.
- We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard information about you. Our operational and data processing systems reside in a secure environment that protects nonpublic personal information from being accessed inappropriately by third parties.

We believe that protecting your privacy is the cornerstone to creating a trusting relationship, and we hope you take comfort in knowing our policies.