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# FACTS

## WHAT DOES COORDINATED FINANCIAL PLANNING DO WITH YOUR PERSONAL INFORMATION?

**Why?**

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

**What?**

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- account balances and transaction history
- investment experience and account transactions

When you are *no longer* our customer, we continue to share your information as described in this notice.

**How?**

All financial companies need to share customer's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer's personal information; the reasons [RIA] chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information | Does [RIA] share? | Can you limit this sharing? |
|---|---|---|
| **For our everyday business purposes—** such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes | No |
| **For our marketing purposes—** to offer our products and services to you | Yes | No |
| **For joint marketing with other financial companies** | No | We don't share |
| **For our affiliates' everyday business purposes—** information about your transactions and experiences | No | We don't share |
| **For our affiliates' everyday business purposes—** information about your creditworthiness | No | We don't share |
| **For non-affiliates to market to you** | No | We don't share |

**Questions?**

Call 877-769-3131 or go to www.coordinatedfinancialplanning.com

| Who we are | |
|---|---|
| **Who is providing this notice?** | Coordinated Financial Planning |
| **What we do** | |
| **How does Coordinated Financial Planning protect my personal information?** | To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. |
| **How does Coordinated Financial Planning collect my personal information?** | We collect your personal information, for example, when you<br>■ open an account or give us your income information<br>■ tell us about your portfolio or deposit money<br>■ enter into an investment advisory contract |
| **Why can't I limit all sharing?** | Federal law gives you the right to limit only<br>■ sharing for affiliates' everyday business purposes—information about your creditworthiness<br>■ affiliates from using your information to market to you<br>■ sharing for non-affiliates to market to you<br>State laws and individual companies may give you additional rights to limit sharing. |
| **Definitions** | |
| **Affiliates** | Companies related by common ownership or control. They can be financial and nonfinancial companies.<br>■ *Coordinated Financial Planning does not have affiliates.* |
| **Non-affiliates** | Companies not related by common ownership or control. They can be financial and nonfinancial companies.<br>■ *Coordinated Financial Planning does not share with non-affiliates so they can market to you.* |
| **Joint marketing** | A formal agreement between nonaffiliated financial companies that together market financial products or services to you.<br>■ *Coordinated Financial Planning does not jointly market.* |

## Other important information

Coordinated Financial Planning may utilized SMS messaging to communicate with the public. You can cancel these messages at anytime by texting "STOP" in response to the message. If you need additional assistance or would like to opt out of these messages email us at mailbox@cfinplan.com or call us toll-free at 877-769-3131.