



## **PRIVACY POLICY & DISCLOSURE**

The Retirement Planning Group has always valued the trust our Clients have placed in us. We are committed to the responsible management, use, and protection of our Clients' personal information. To provide the advice and attention you require, we routinely collect, maintain and use nonpublic information about you. To help you understand how your nonpublic personal information is protected at The Retirement Planning Group, we are providing you with this statement to describe our practices and policies. In the event you terminate your Client relationship with us, or become an inactive Client, we will continue to adhere to the policies and practices described in this notice.

### Information We Collect

As your trusted investment advisor, we collect, retain and use nonpublic personal information about our Clients from such sources as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us or others
- Information from authorized representatives such as your attorney or CPA.

### Sharing your Information

**The Retirement Planning Group shares nonpublic information only when necessary to advise and service our Clients and help you manage your accounts. We do NOT disclose any nonpublic personal information about our Clients, prospective Clients or former Clients to anyone, except as permitted by law.**

### Third Parties

As noted above, we may disclose nonpublic personal information to third parties. We may share any of the information that we collect as permitted by law. These third parties include financial service providers such as institutional custodians, mortgage brokers, insurance companies, or broker dealers. We share such information only when necessary to effect transactions, to provide account maintenance, or to provide advice and customer service to you and your account. We do NOT sell or trade your nonpublic personal information to third parties.

### How We Protect Your Information

The Retirement Planning Group will internally safeguard your nonpublic personal information by restricting access to only those employees who provide services to you or those who need access to your information to service your account(s). We maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information. We educate our employees about the importance of confidentiality and Client privacy. Additionally, clients may opt out from our sharing of information with the aforementioned outside parties by notifying us by telephone, mail, fax, email or in person.

### Find Out More

We would like to hear from you. If you have any questions about our privacy program or the way your information is safeguarded and used, please contact Robert O'Blennis, our Chief Compliance Officer, at [rob@planningretirements.com](mailto:rob@planningretirements.com) or 913-498-8898.

Promptly advise The Retirement Planning Group of any material changes to your financial situation or if your portfolio allocation does not match your risk tolerance. Please contact us if you would like an updated copy of The Retirement Planning Group Form ADV2 and/or this Privacy Policy & Disclosure.

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