

## PRIVACY POLICY

### Overview

Agile Financial Planning (AFP) collects nonpublic personal information in the course of providing financial planning and asset management services to clients. AFP is committed to safeguarding the confidential information of all current, former, and potential clients. The firm does not sell clients' personal information to anyone and discloses such information only under very limited circumstances.

### Collecting Personal Information

AFP collects and maintains:

- Information directly from clients such as address, phone number, date of birth, social security number, and other financial information
- Information from statements and notices such as account numbers, account balances, transactions, and trades
- Information from agreements and records such as insurance terms, beneficiaries, health history, trust declarations

### Communicating Personal Information

AFP may disclose personal information only when:

- Authorized by clients in writing
- Required by law to comply with regulators or enforcement authorities
- Required to service client accounts

### Protecting Personal Information

AFP maintains administrative, technical and physical safeguards designed to reasonably ensure the security and confidentiality of client records and information. To protect this information, AFP:

- Maintains appropriate security measures for computer and information systems, including the use of passwords and firewalls.
- Uses locks and other appropriate physical security measures to safeguard client information stored in paper format.
- Disposes of client information stored in electronic or paper form in such a manner (e.g., through the use of a shredder) to reasonably ensure such information is protected from unauthorized access.
- Ensures third party partners servicing client accounts also disclose and maintain a privacy policy that is aligned to that of AFP.