

# PRIVACY PRACTICES

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## **LifePlan Investment Advisors, INC.**

In 1999, Congress passed the Gramm-Leach-Bliley Act (the "GLBA") in an effort to modernize the American financial markets. In connection with modernizing the financial marketplace, the GLBA established standards for how financial institutions must protect the privacy of consumer financial information. Under the GLBA, the definition of financial institutions includes investment advisers.

As part of our normal business practices, we must obtain certain "nonpublic personal and financial information" about our clients as well as potential clients, which for the ease of reading will be referred to as "information" in this notice.

This information includes data we receive from you verbally and on applications or other forms (i.e. your name, address, social security and accounts at other institutions, tax forms and estate documents), information about your transactions with us, our affiliates or others, and information we may receive from third-party sources you refer us to.

We restrict all access to this information to authorized parties who are required to know this information in order to provide services and products requested by our clients. We do not disclose any information with other client advisors (CPAs, Attorneys, etc.) without first obtaining client permission. We maintain physical, electronic, and procedural safeguards to protect client information.

We do not disclose, and do not wish to reserve the right to disclose, nonpublic personal financial information of clients, nor prospective clients or former clients to affiliates or nonaffiliated third parties except under the limited exceptions for processing and servicing transactions and legal requirements.

We do not disclose, sell, or make available any contact information (public or nonpublic) of clients, former clients, nor prospective clients to any entity for any purposes including their marketing. We do not disclose client names or contact information to prospective clients without our clients' prior and specific approval.

We only make disclosures of nonpublic personal financial information of our clients or prospective clients to nonaffiliated third parties as required by law or first authorized by our clients.



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