

## **PRIVACY POLICY DISCLOSURE**

Coordinated Financial Planning Corporation (“we”) collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms; and,
- Information about your transactions with us, or others.

We may disclose the following kinds of nonpublic personal information about you:

- Information we receive from you on applications and other forms, such as your name, address, social security number, assets, income, etc.;
- Information about your transactions with us or other firms, such as your account balances, parties to transactions and security trade information.

We may disclose all of the information we collect, as described above.

We may disclose nonpublic personal information about you to financial service providers you do business with or authorize us to release information to, such as tax preparers and attorneys.

We restrict access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

If you have any questions regarding any of the above, please contact us at (513) 769-3131 or toll-free (877) 769-3131.