

Elevate Planners, LLC Privacy Policy Statement

FACTS	WHAT DOES ELEVATE PLANNERS DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers (our clients and prospective clients) the right to limit some but not all sharing. Federal law 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?	<p>The firm collects personal information about consumers from the following sources:</p> <ul style="list-style-type: none"> ✓ information provided to us for their financial plan or investment recommendations ✓ information provided through engagement agreements and other documents completed in connection with the engagement ✓ information provided verbally, and ✓ information received from service providers, such as custodians, about investment account transactions.
How?	Financial companies often need to share consumers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their consumers' personal information, the reasons Elevate Planners chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does Elevate Planners 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 or legal investigation	Yes	No
For our internal marketing purposes -- to offer our services to you	Yes	No
For joint marketing with other financial companies	Yes – We share limited data with our solicitors	Yes
For our affiliates everyday business purposes -- information about your transactions and experiences	No – We do not have affiliates	Yes
For our affiliates to market to you	No – We do not have affiliates	Yes
For non-affiliates to market to you	No	We don't share

What we do	
How does Elevate Planners protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with state or federal law, as appropriate. These measures include computer safeguards and secured files and buildings. We also maintain procedural safeguards to protect your personal information.
How does Elevate Planners collect my personal information?	<ul style="list-style-type: none"> ✓ We collect your personal information when you engage our advisory firm ✓ When you use a check to pay our firm <p>We do not collect your personal information from others such as credit bureaus, affiliates, or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> ✓ sharing for affiliates' everyday business purposes ✓ affiliates from using your information to market to you ✓ sharing for non-affiliates to market to you <p>State laws and individual companies (i.e., your insurance company, etc.) may give you additional rights to limit sharing.</p>

Definitions	
Affiliates	<p>Companies related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> ✓ <i>Elevate Planners does not have an affiliate.</i>
Non-Affiliates	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> ✓ <i>Elevate Planners shares limited information with unaffiliated solicitors.</i>
Joint Marketing	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> ✓ <i>We do not engage in joint marketing arrangements.</i>

We will provide you with our privacy policy, in advance, if our firm privacy policies are expected to change.

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