



Financial Life Planners

GET CLEAR. GET FOCUSED. GET WEALTHY.

Financial Life Planners

Privacy Notice

February 12, 2025

Facts	WHAT DOES Financial Life Planners, LLC (“FIRM”) DO WITH YOUR PERSONAL INFORMATION?	
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also 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 types of personal information we collect, and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> • Social Security number and income • Account balances and payment history • Credit history and credit scores 	
How?	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons we choose to share; and whether you can limit this sharing.	
	Reasons we can share your personal information	Do we share?
	Can you limit this sharing?	
For our everyday business purposes - such as to process your transactions, maintain your accounts(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes - to offer our products and services to you. <i>SMS/Phone number consent will not be shared with third parties for marketing purposes.</i>	Yes	No
For joint marketing with other financial companies	No	Not Applicable

For our affiliates' everyday business purposes – information about your transactions and experiences.	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness.	No	Not Applicable
For our affiliates to market to you	No	Not Applicable
For non-affiliates to market to you	No	Not Applicable

To limit our sharing	<p>*Mail the form below.</p> <p>Please note:</p> <p>If you are a new customer, we can begin sharing your information from the date you received this notice. When you are no longer our customer, we continue to share your information as described in this notice.</p> <p>However, you can contact us at any time to limit our sharing.</p>
Questions?	Call 480-477-8530
Who we are	
Who is providing this notice?	Financial Life Planners, LLC. ("FIRM")
What we do	
How does FIRM protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards, secured files, and buildings.
How does FIRM collect my personal information?	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> ● Open an account

<p>Why can't I limit all sharing?</p>	<p>Federal law gives you the right to limit only.</p> <ul style="list-style-type: none"> • Sharing for affiliates' everyday business purposes--- information about your creditworthiness • Affiliates from using your information to market to you. • Sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
<p>What happens when I limit sharing for an account I hold jointly?</p>	<p>Your choices will apply to everyone on your account--- unless you tell us otherwise.</p>
<p>Definitions</p>	
<p>Affiliates</p>	<p>Companies related by common ownership or control. They can be financial and non-financial companies.</p>
<p>Non-affiliates</p>	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p>
<p>Joint marketing</p>	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p>
<p>Other important information</p>	

<p>Mail-in this section</p>		
<p>If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below.</p> <ul style="list-style-type: none"> • Apply only to me 		
	<p>Name</p>	<p>Mail to: Financial Life Planners 2151 E Broadway, Suite 203, Tempe, AZ 85282</p>
	<p>Address</p>	
	<p>City, State, Zip</p>	