

MINDFUL MONEY FINANCIAL COUNSEL, LLC

PRIVACY POLICY

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.

Protecting your privacy is extremely important to us. Any information and documents provided to us about you, your family, and your financial circumstances, will be kept strictly confidential. To protect your personal information from unauthorized access and use, we use security measures that comply with federal laws. These measures include computer safeguards, and secured files and buildings.

The types of information we collect depends on the service we provide to you. Typically, the information is gathered through personal interviews and questionnaires, and may include:

- Personal information, such as your name, social security number, and date of birth.
- Financial information, such as income, assets, liabilities, and net worth.
- Account information, such as custodians, holdings, and account balances.

Your information will only be used for our financial consulting, planning, and advisory purposes. We use third-party software and web-based applications in providing our services, and we may share your personal information within these third-party products. However, we take reasonable steps to ensure that these third parties are taking adequate measures to protect your data.

We may use your personal data to market additional services to you. However, we do not share any personal data with any other mailing lists or marketing agencies. We do not engage in joint marketing arrangements with any other parties.

In some cases, we may be required to disclose personal information to disclose such information to federal and state regulatory authorities, or as may be required by law, by subpoena, or by court order.

If you have any questions or concerns about the privacy of your data, please contact us immediately. We can be reached at 312-846-1437 or go to www.mindfulmoneyfinancial.com.