iPlanGroup

RETIREMENT DRIVEN BY YOU

IRA Plan Partners, LLC DBA iPlanGroup Privacy Policy

This is the privacy policy of IRA Plan Partners, LLC DBA iPlanGroup (hereafter "iPlan"). This document is an explanation of iPlan's internal policies regarding how we collect, use, and disclose your non-public information. We believe that your privacy should not be compromised. At the same time, we offer you the services you need to accomplish your financial goals. iPlan believes that the confidentiality and protection of client information is one of our fundamental responsibilities. While such information is critical to providing quality service, we also understand that one of our most important assets is our clients' trust. Thus, the safekeeping of client information is a priority for us.

GROWTH IN THE VALUE OF YOUR IRA

The assets in your IRA account will be invested only in accordance with you (or your duly authorized agent's) direction. IRA Plan Partners, LLC DBA iPlanGroup does not offer investment advice or recommend or evaluate the merits or suitability of any investment. The assets in the IRA account at any given time may contain one or more assets depending upon which investments you have selected. It is therefore impossible to estimate the value of the IRA assets in the account at any given future point in time. Growth in the value of the IRA account is neither guaranteed nor projected. The value will be computed by totaling the reported fair market value of the assets in your account.

THE INFORMATION WE COLLECT

Information about client is accumulated from various sources. Most of the information is provided to us directly by the clients themselves. Still other information is obtained from outside sources. We will limit the use and collection of information about our clients to that which is necessary to administer our business and provide superior service. This means that we will use information to help us identify and mitigate potential risks or loss to iPlan only in accordance with the principles set out in this policy.

HOW WE USE AND PROTECT THIS INFORMATION

The information collected is used to aid in the provision of our various retirement accounts and services we provide to you as your chosen IRA administrator. The information that we retain will be used by iPlan's employees and any of affiliates who may play a role in servicing your retirement account needs. iPlan has established procedures the ensure that your information is accurate, current, and complete. Each iPlan employee is required to follow our "Code of Conduct," which states that all client information is considered private and privileged and is to be used solely for the purpose of providing our clients with the finest service. iPlan is committed to the security of your financial and personal information. All of our operational and data processing systems are in a secure environment thereby protecting your account information from being accessed by third parties. We maintain and grant access to client information only in accordance with our internal security standards.

INFORMATION THAT WE SHARE ABOUT YOU OR YOUR ACCOUNT

Unless directed by you through the completion of our Agent Authorization Form or the Interested Third Party section found within our investment forms/kits, we do not disclose nonpublic personal information to any unaffiliated third parties. We do not reveal personal data to anyone outside if iPlan unless: 1) you request or authorize it; 2) the information needs to be provided to complete a transaction initiated by you; 3) the information is provided to a credit bureau or similar information reporting agency as necessary to service your account; 4) the disclosure otherwise is lawfully required.

CHANGES TO OUR PRIVACY POLICY

IRA Plan Partners, LLC will provide you with a copy of our Privacy Policy on an annual basis as required by federal law. In addition, IRA Plan Partners, LLC reserves the right to modify this policy at any time while complying with all federal and state law regulations. If such changes are made to this document, you will receive a copy of our amended Privacy Policy.

HOW TO CONTACT IRA PLAN PARTNERS, LLC WITH QUESTIONS

If you have any questions or concern you may contact us at 1-855-604-7526. We respect your desire for privacy and take our commitment to protecting the confidentiality of your personal and financial information very seriously. We appreciate and value your business and look forward to our continued relationship. Thank you for choosing IRA Plan Partners, LLC.