



Privacy Policy

Integrated Financial Planning Solutions, LLC

As of January 8, 2024

Integrated Financial Planning Solutions, LLC (“IFPS”) recognizes that our relationships with current and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We place the highest value on the information you share with us and will not sell your personal information.

We want our clients to understand what information we collect, how we use it, and how we protect your personal information.

Why We Collect Your Information

We gather information about you so that we can:

- Help design and implement the investment and planning related services we provide you; and
- Comply with the Federal and State laws and regulations that govern us.

What Information We Collect and Maintain

We may collect the following types of “nonpublic personal information” about you:

- Information from our initial meeting or subsequent consultations about your identity, such as your name, address, social security number, date of birth, and financial information.
- Information that we generate to service your financial needs.
- Information that we may receive from third parties with respect to your financial profile.

What Information We Disclose

All financial companies need to share client personal information to run their everyday business. We use information about you to provide our financial planning services to you. We may disclose the information to third parties as permitted by law, including the broker/dealers, custodians, software providers, independent contractors hired by IFPS, or other companies used to provide services to you. From time to time, we may be required to give information about our business to regulatory authorities. This may include personal information about you. We do not sell your personal information to anyone.

Arrangements with companies or independent contractors not affiliated with Integrated Financial Planning Solutions, LLC will be subject to confidentiality agreements.

How We Protect Your Personal Information

Privacy has always been important to Integrated Financial Planning Solutions, LLC. We restrict and limit access to client information only to those who need to carry out their business functions. We educate employees about safeguarding client information and preventing its unauthorized access, disclosure, or use. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information.