



PLAN FOR IT FINANCIAL

CLARITY TO DECIDE • CONFIDENCE TO ACT

Privacy Policy

Plan For It Financial, LLC (“PFIF”) 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. PFIF will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. PFIF will provide this privacy statement to all clients annually.

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:

- Design and implement the investment and financial 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; and
- Information that we may receive from third parties in connection with the services we provide you.

What Information We Disclose

We are permitted by law to disclose nonpublic personal information “NPI” about you to unaffiliated third parties in certain circumstances. Unaffiliated third parties are companies not related to PFIF by common ownership or control and could be financial and nonfinancial companies. PFIF may disclose your NPI: (1) to individuals and/or entities not affiliated with PFIF, including, but not limited to, third-parties that assist in the supervision or management of your account(s) (i.e. account custodian, record keeper, attorney, etc.); (2) to service providers contracted by us for everyday business purposes in order for us to perform the duties of your engagement with PFIF (i.e. client management systems, archiving technology vendors, cloud service providers, billing software etc.); (3) to your authorized representative or power of attorney; (4) when we receive your prior consent; (5) as otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations. If we do not receive permission to share this NPI, then we are prohibited from sharing this NPI with unaffiliated third parties.

In the event that PFIF has a change to its client privacy policy that would allow it to disclose NPI not covered under applicable law, PFIF will allow its clients the opportunity to opt-out of such disclosure.

How We Protect Your Personal Information

Privacy has always been important to PFIF. We safeguard client information by preventing its unauthorized access, disclosure, or use. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information, and strict confidentiality policies that apply to all PFIF personnel. Arrangements with companies or independent contractors not affiliated with PFIF, or any individuals or companies we hire to help us provide services to you, will be subject to confidentiality agreements.

Former Clients

Even if we cease to provide you with financial services, our Privacy Policy will continue to apply to you, and we will continue to treat your nonpublic information with strict confidentiality. We maintain all records regarding all former clients for the retention period required by law.

Contact Us

Clients are encouraged to discuss any questions regarding privacy policies and procedures directly with Christopher Lazzaro, Chief Compliance Officer of PFIF. Please contact Christopher Lazzaro at (781) 808-2349.