

PRIVACY POLICY

Milestone Financial Planning, LLC (“MFP”) is committed to maintaining the confidentiality, integrity and security of your personal information.

By using our website and/or our services, you consent to the data practices described in this Policy. We may make changes to this Privacy Policy by posting an updated version of the Privacy Policy on our website. It is your responsibility to review the Privacy Policy frequently and remain informed about any changes to it, so we encourage you to visit the Privacy Policy location of our website often.

The Information We Use:

If you are a client, we may obtain such information as your name, social security number, mailing address, email address, phone number, date of birth, banking account numbers, and credit card or other payment information, as needed to provide our services to you.

We may use this information to:

- Administer and update your account(s) and/or project(s) and/or requested service(s);
- Verify your identity and protect against fraud;
- Provide the services you request; and

We may disclose this information to our service providers who help us provide our services (including but not limited to information technology consultants and compliance professionals). We also may disclose this information:

- In accordance with your express instructions or consent of your authorized representative;
- To carry out transactions requested by you; and
- As otherwise required by law.

In addition, with your permission, we also disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

We do not provide your personal information to mailing list vendors or solicitors.

Federal and state securities regulators may review our company records and your personal records as required by law.

Milestone Financial Planning, LLC and Jennifer L Davidson, CPA PC (our related CPA firm) share offices, software, employees and servers. Many, but not all, of Milestone Financial Planning, LLC’s clients are also clients of Jennifer L Davidson, CPA PC. Any employee or owner of Jennifer L Davidson, CPA PC has access to Milestone Financial Planning, LLC client data, including Personally Identifiable Information.

In the event that you hold shares of mutual funds in accounts we manage on your behalf, through a financial intermediary, such as a broker-dealer, bank or trust company, the privacy policy of your financial intermediary would govern how your non-public personal information would be shared with non-affiliated third parties.

Safeguarding your information

We limit employee access only to those who have a business reason for knowing, and only to nonaffiliated parties as permitted by law. We require an email from you authorizing us to discuss your financial situation with your accountant, attorney, or others that you may designate.

We maintain a secure office and equipment infrastructure to ensure that your information is not placed at unreasonable risk.

Opting Out of Our Sharing of Your Information. Federal law gives consumers the right to limit some but not all sharing.

Reasons we can share your personal information	Does MFP share?	Can you limit this sharing?
For our everyday business purposes- to process your transactions, maintain your account	Yes	No
For our marketing purposes- to offer our products and services to you	Yes	Yes