



Brooklyn Plans, LLC

Privacy Policy

Keeping client information secure and private is a priority for me. The following describes my Privacy Policy. Please take a moment to review it and feel free to contact me with any questions.

WHAT TYPE OF NON-PUBLIC PERSONAL INFORMATION DO I COLLECT ABOUT YOU?

In the course of providing service to you, I collect nonpublic personal information including the following:

- Personal Information (name, address, social security number, assets, types and amounts of investments, transactions, and income);
- Information about your investment account transactions (for example, your account balances, types and amount of investments)
- Information that we generate to service your financial needs.

HOW WE PROTECT YOUR PERSONAL INFORMATION

Keeping your information secure is one of my most important responsibilities. I maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

I do not sell, share or disclose your non-public information to non-affiliated third party marketing companies. I may disclose nonpublic personal information about you under circumstances as permitted or required by law. These disclosures typically include information to process transactions on your behalf, to conduct our operations, to follow your instructions as you authorize, or to protect the security of our financial records.

WHY WE COLLECT YOUR INFORMATION

- 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.

If you become an inactive client, I will adhere to the privacy policies and practices as stated above.