

Customer Privacy of Information Policy

As a client of Global Financial Planning Group, LLC you have put your trust in us to help you pursue financial independence. To maintain that trust, we are committed to protect the privacy and security of your personal information that we keep on file in order to transact business on your behalf. This notice is intended to help you understand how we collect, handle, and safeguard that information.

We treat your personal information in a strictly confidential manner. We do NOT provide any of your personal information to unrelated companies for the purpose of marketing their products or services.

Because we have established a relationship, you are requested to furnish personal and financial information used to assist in assessing your investment objectives and goals. The information you share with us is often private and confidential, and we are therefore committed to its protections. In addition to the information collected, during the course of our relationship we may also collect a variety of nonpublic personal information from other sources. The confidential information we collect may include the following:

1. Information we receive from you, such as your name, address, Social Security number, assets, income, investment objectives and other information, as required by Industry Regulators.
2. Information regarding your transactions, including balances, portfolio holdings, cash balances, margin balances and customer statements. Also included may be portfolio evaluations.
3. Information we receive from our broker dealer – LPL Financial, our various fund sponsors, unaffiliated custodians and money managers, your accountant, attorney or other professional obtained by you.
4. Medical or health information that you, the customer, authorize us to receive from doctors or other health care providers and medical vendors, in relation to the advice provided on a traditional or variable life policy.

Global Financial Planning Group, LLC does not share customer information with any third party other than those that are authorized by you, or that are required in order for us to provide the services agreed upon by you, to service your account, execute a transaction or process transactions to adhere to regulation or law.

LPL Financial has a regulatory requirement to supervise certain activities. We may share your information with broker-dealer firms having regulatory requirements to supervise certain of Global Financial Planning Group, LLC's activities.

Global Financial Planning Group, LLC has established policies to maintain physical, electronic and procedural safeguards to maintain the confidentiality of the personal information of our customers. Appropriate measures are taken to ensure that access is available to those individuals who need to know that information in order to provide our products and services.