

Facts	What Does CFPC Do with Your Personal Information?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information we collect can include:</p> <ul style="list-style-type: none"> ▪ Social Security number ▪ Investment experience ▪ Income ▪ Account transactions ▪ Assets ▪ Retirement assets <p>When you are <i>no longer</i> our customer, we will continue to hold your information and share it as described in this notice.</p>
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons why financial companies can share their customers' personal information, the reasons LWM chooses to share personal information and whether you can limit this sharing.

Reasons We Can Share Your Personal Information	Does CFPC Share?	Can You Limit This Sharing?
For our everyday business purposes, such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes to offer our products and services to you	No	We don't share
For joint marketing with other financial companies	Yes	No
For our affiliates' everyday business purposes—information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes—information about your creditworthiness	No	We don't share
For nonaffiliates' to market to you or joint marketing with other financial companies—	No	We don't share
If your independent representative terminates his or her relationship with us and moves to another brokerage or investment advisory firm, we or your independent representative may disclose your personal information to the new firm, unless you instruct us not to by returning a completed privacy notice to us.	Yes	Yes

Questions?	Please call 843.276.0817 or Go to www.CharlestonFP.com
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Who we are

Who is providing this notice?	Charleston Financial Planning Consultants
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What We Do

How does CFPCI protect my personal information?	<p>To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.</p> <p>We train our employees in proper handling of personal information. We require companies that help provide our services protect the confidentiality of your personal information they receive..</p>
How does CFPC collect my personal information?	<p>We collect your personal information, for example, when you:</p> <ul style="list-style-type: none">▪ Open an account▪ Apply for insurance▪ Seek advice about your investments▪ Enter into an investment advisory account▪ Tell us about your investment or retirement portfolio <p>We also collect your personal information from others such as credit bureaus, affiliates or other companies.</p>
Why can't I limit all sharing?	<p>Federal law gives you the right to limit only:</p> <ul style="list-style-type: none">▪ Sharing for affiliates' everyday business purposes—information about your creditworthiness▪ Affiliates from using your information to market to you▪ Sharing for non-affiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.</p>

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies.
Non-Affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies.
Joint marketing	A formal agreement between non-affiliates financial companies that together market financial products or services to you:

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