

S.E.E.D. Planning Group, LLC Privacy Policy

Effective: August 22, 2019

Our Commitment to You

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we are committed to safeguarding the use of any personal information that we obtain as your Financial and/or Investment Advisor, as described here in our Privacy Policy.

We do not sell your non-public personal information. We protect the security and confidentiality of personal information and we have controls in place to ensure that such information is discretely used for proper business purposes in connection with the management or servicing of our relationship with you.

How We Protect Your Information

To safeguard your personal information from unauthorized access and use we maintain physical, procedural and electronic security measures. These include such safeguards as secure passwords, encrypted file storage and a secure office environment. Our technology vendors are required to protect the personal nonpublic information they receive from us by providing security and access control over personal information and having policies regarding the transmission of data. Our employees are trained on their responsibilities to protect nonpublic personal information.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include your Social Security number, date of birth, banking information, financial account numbers and/or balances, sources of income, and credit card numbers or information.

Information Disclosure and Your Rights

As an investment adviser, there are situations where we may need to share non-public information to run our everyday business. In the section below, we list the most common reasons we may share your personal information. We are required by law to inform you of our policies regarding privacy and client information as well as to inform you regarding how we collect, share, and protect your personal information. Federal law gives you the right to limit some but not all sharing of personal information by "**opting-out**".

1. **Servicing our Clients** (you cannot limit): We may share non-public personal information with affiliated (Bloom Tax Partners LLC) and non-affiliated third parties (such as administrators, brokers, custodians, regulators, technology service providers, and other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including: processing transactions; general account maintenance; record keeping; income tax preparation/planning, and responding to regulators or legal investigations.
2. **Marketing purposes** (not shared): S.E.E.D. does not disclose, and does not intend to disclose, personal information with affiliated or non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where we or the client has a formal agreement with the financial institution. *We will only share information for purposes of servicing your accounts, not for marketing purposes.*
3. **Authorized users** (you can limit): Your non-public personal information may be disclosed to you and persons that we believe to be your authorized agent(s) or representative(s).
4. **Information about former clients** (not shared): S.E.E.D. does not disclose and does not intend to disclose, non-public personal information to non-affiliated third parties with respect to persons who are no longer our clients.

Changes to Our Privacy Policy

We will send you a copy of this Policy annually for as long as you maintain an ongoing relationship with us.

Periodically we may revise this policy. We will provide you with a revised policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.

Any Questions, Concerns or to “Opt Out”?

You may “opt out”, ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting us at (607) 217-5091 or by email at info@SEEDPG.com.