IRA Plan Partners, LLC DBA iPlanGroup Privacy Policy

This is the privacy policy of IRA Plan Partners, LLC. This document is an explanation of our internal policies regarding how we collect, use and disclose your non-public information.

THE INFORMATION WE COLLECT

IRA Plan Partners, LLC collects information using various methods including but not limited to: event driven leads, web opt-ins, webinars, client referrals, surveys, and general feedback.

When you establish an account with IRA Plan Partners, LLC (hereinafter referred to using "we" "our" "us" or "IRA Plan Partners, LLC") we will collect and store your personal information. All information that we obtain from you will aid us in overseeing your account and investment needs with our company. If for any reason, your relationship with us is terminated, we will continue to adhere to the current privacy policy.

The type of personal information we collect may include, but is not limited to: name, contact information, identification information, credit card information, beneficiary information, marital status, educational background, occupational information, salary information, annual income, net worth, investment experience, investment objectives, relationships with broker dealers and/or investment advisors, account number and related/unrelated responsible third parties.

HOW WE USE THIS INFORMATION

The information collected is used to aid in the provision of our various retirement accounts and services we provide to you as your chosen IRA administrator such as: customer service, accounting/record keeping, transfers, purchase/sale of investment assets, expense payments, contribution/distribution of funds, changes in pricing of assets, mail forwarding, tax reporting, etc.

This information is typically obtained with the completion of IRA Plan Partners, LLC's internal account opening kits, account establishment applications, Custodial Agreement, investment kits, and account maintenance forms.

All information that we retain will be used by all contractual employees and our affiliates who may play a role in servicing your retirement account needs.

We may record calls to/from our employees for the purpose of accuracy and performance reviews, training and general quality assurance. All recorded calls will be retained for 30 days, at which time, they will be destroyed.

INFORMATION THAT WE SHARE ABOUT YOU OR YOUR ACCOUNT

Unless directed by you through the completion of our Agent Authorization Form or Interested Third Party section found within our investment forms/kits, we do not disclose nonpublic personal information to any unaffiliated third parties. However, there may be situations in which we may be obligated to provide your account information in order to comply with law enforcement, federal, state and local agencies. In addition, we may be required to disclose necessary account information to the IRS for tax purposes and/or concerns of suspicious activity.

When completing any of our internal investment related authorization forms, we may communicate known deficiencies to the appointed realtors, selling agents, title companies, county agents, recording officers, legal counsels, brokers, managing members, principals and/or investment advisors associated with your request in order to help facilitate the completion of your requests related to your individual retirement accounts.

CHANGES TO OUR PRIVACY POLICY

IRA Plan Partners, LLC will provide you with a copy of our Privacy Policy on an annual basis as required by federal law. In addition, IRA Plan Partners, LLC reserves the right to modify this policy at any time while complying with all federal and state law regulations. If such changes are made to this document, you will receive a copy of our amended Privacy Policy.

HOW TO CONTACT IRA PLAN PARTNERS, LLC WITH QUESTIONS

If you have any questions or concern you may contact us at 1-855-604-7526. We respect your desire for privacy and take our commitment to protecting the confidentiality of your personal and financial information very seriously. We appreciate and value your business and look forward to our continued relationship. Thank you for choosing IRA Plan Partners, LLC.