GIANOLA FINANCIAL PLANNING, LLC PRIVACY NOTICE

Our Commitment to Privacy

The relationship between our firm and our clients is our most important asset. We respect and value that you have entrusted us with private personal information and we work diligently to maintain that trust. We are committed to protecting the confidentiality, integrity, and security of your personal information. We do not disclose your personal information to anyone unless you have given us permission or we are required by law to do so. We do not sell your personal information to anyone.

Personal Information We May Collect

We collect your personal information so we may provide financial planning services to you. The types and categories of information we collect and maintain include:

- Information you provide in our questionnaire and other forms (including name, address, telephone number, Social Security number, date of birth, and financial information).
- Information about your transactions with us (such as the types of investments you have made and your account status).
- Information we receive from third parties with respect to your account (such as trade confirmations from brokerage firms).

How We Use Information We Collect

In order to provide financial planning services to you, we may disclose personal information we collect and maintain in very limited instances, including:

- Disclosures authorized or requested by you (for example, to provide financial information in support of your mortgage loan application).
- Disclosures required by law (for example, to cooperate with regulators).
- Disclosures otherwise permitted by law as necessary to service your account (such as providing account information to a custodian like Schwab).

How We Protect Your Personal Information

We maintain physical, electronic and procedural safeguards to protect your personal information. We also limit access to personal information to employees and third parties as necessary or appropriate to provide services to you.