

PRIVACY POLICY STATEMENT

Shore Financial Planning, LLC, is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us. Shore Financial Planning understands the need for careful handling of this information, and we maintain a secure office to ensure that your information is not placed at unreasonable risk. We require confidentiality in our agreements with unaffiliated third parties that have access to your personal information, including financial service companies, consultants, and auditors.

The categories of nonpublic information that we collect from you may include your social security number, address, date of birth, investment account information, information about your personal finances, and information about transactions between you and third parties. This personal identifiable information about you will be maintained while you are a client, and for the time period thereafter your information is required to be maintained by federal and state securities laws. After that time, your information may be destroyed without notice to you.

We will disclose limited personal information about you to third parties as permitted or required by law, including but not limited to; attorneys, accountants, and mortgage lenders with whom you have established a relationship. We will collect and disclose the personal information needed to open and maintain custodial accounts and for receiving services from your account's custodian, and when applicable- for you to receive services by a third-party adviser performing investment management services to your account. At times, you may opt out of our sharing of your information with these third parties by notifying us by telephone, mail, email, or in person.

We do not provide your personal information to mailing list vendors or solicitors.

We will notify you if our privacy policy is changed.