



PRIVACY POLICY

Retirement Researcher, LLC is committed to safeguarding the confidentiality and security of our clients' personal and private information. Federal law requires us to inform clients how we collect, disclose and safeguard their personal information. Please read this notice carefully to understand our privacy policy.

INFORMATION WE COLLECT

While providing services to our clients, we receive and collect personal information from clients; their accountants and attorneys and other third party representatives; and information provided through (i) applications, contracts or other forms; (ii) client documents; (iii) transactions; and (iv) internally documented conversations. Categories of nonpublic personal information collected through these means can include a client's date of birth, social security number, and relevant client account information.

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INFORMATION WE DISCLOSE

We do not disclose the nonpublic personal information we collect about our clients and prospective clients to anyone except: (i) in furtherance of the business relationship which we conduct on a client's behalf, and then only to those persons necessary to effect the transactions and provide the services that a client authorizes (such as broker-dealers, custodians, independent managers); (ii) to persons assessing our compliance with industry standards (e.g., professional licensing authorities); or (iii) our attorneys, accountants, and auditors (to the extent necessary). We do not permit clients to opt out of these limited sharing scenarios. We are permitted by law to disclose the nonpublic personal information about you to governmental agencies and other third parties in certain circumstances (such as third parties that perform administrative services on our behalf). Any third party that is in receipt of nonpublic personal information is prohibited to use or share the information for any other purpose.

In order to opt out of our use of cookies, client can either a) avoid using our website altogether, b) visit <http://www.networkadvertising.org/choices> to opt out of interest-based advertising delivered to your device via HTTP cookies only, or c) refuse or delete cookies using their own browsers or mobile devices. However, for any additional electronic device that you may use, you will be required to visit this site again.

If you decide at some point to terminate our services, we will continue to adhere to our privacy policy, as may be amended from time to time. We do not sell client personal information to anyone.

SAFEGUARDING INFORMATION

We limit employee and agent access to client nonpublic personal information to those who are required to know the information to provide services to the client. Furthermore, we make every reasonable effort to ensure that our office and computer environments are secure, and maintain physical, electronic and procedural safeguards that comply with applicable federal or state standards. Outdated personal information will be securely maintained for a period of time as required by law, then destroyed.

POLICY CHANGES

Clients will be provided notice of any material change in our privacy policy. Please contact us at community@retirementresearcher.com or at 833-828-9811 with any questions.