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PRIVACY STATEMENT

Partnership Financial LLC is committed to maintaining the confidentiality, integrity, and security of your personal information.

The nonpublic data we collect may include information about your personal finances, health (to the extent needed for the financial planning process), information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this data to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may opt out from our sharing this information parties by notifying us at any time. With your permission, we share limited information about you with your brokerage firm in order to execute securities transactions on your behalf. With your permission, we share limited information about you when responding to inquiries from the Internal Revenue Service.

We maintain a secure office to ensure your information is not placed at unreasonable risk. All client data is kept in a secured cloud environment, protected by bank-equivalent security measures. All cloud information is backed up nightly in multiple secured (guarded and encrypted) locations. Data access is through encrypted transmission channels. No information is kept on advisor or staff PCs. Our office LAN employs firewalls and other techniques to protect your data. In remote meetings we employ 128-bit secure communications between PCs.

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

We require strict confidentiality in our agreements with third parties that require access to personal information, including financial service companies, consultants, and auditors. As permitted by law, federal and state regulators may review our Company records and your personal records.

Your personal information is maintained while you are a client, and for the period thereafter as required by federal and state securities laws. After that time, information may be destroyed.

We will notify you when our privacy policy changes. We are required by law to deliver this *Privacy Statement* to you annually, in writing.