



Client Privacy Notice

This notice is being provided on behalf of Peachtree Planning Advisors, Inc. ("PPA"). PPA strongly believes in protecting the confidentiality and security of information we collect about individuals. This notice describes the privacy policy followed by each PPA registered investment advisor regarding:

- How we treat the information we receive ("Information") about individuals who apply for or obtain our products or services ("Individuals"); and
- The third parties with whom we may share this Information.

Information we collect. "Nonpublic Personal Information" is nonpublic information about the Individual that we obtain in connection with providing a financial product or service to the Individual for personal, family, or household purposes.

We collect Nonpublic Personal Information about Individuals from the following sources:

- Information provided to us directly by an Individual on an application or other form in connection with our products or services. This may include but not be limited to: name, address, social security number, assets and income.
- Information about an Individual's transactions with us, our affiliates, or others, such as account balance, payment history, parties to a transaction, credit/debit card usage, and insurance policy coverage and premiums.

Information disclosure to third parties. We do not disclose any Nonpublic Personal Information about our customers or former customers to anyone, except as permitted by law.

Information we provide to our service providers and joint marketing partners. We may disclose all of the Information we collect, as described above, to nonaffiliated companies that perform marketing services on our behalf, or to other financial institutions with whom we have joint marketing agreements. For example, Information may be disclosed to others to enable them to provide business services for us, such as helping us to evaluate requests for our products

or services, performing general administrative activities for us, and assisting us in processing a transaction requested by an Individual.

Disclosure of information about former customers. If an individual decides to close an account or otherwise becomes an inactive customer, we will continue to follow privacy practices described in this notice with respect to such Individual.

Protecting confidentiality and security. We treat Information in a confidential manner. Our employees are required to protect the confidentiality of Information. Employees may access Information only when there is an appropriate reason to do so, such as to administer or offer our products and services. Employees are subject to disciplinary rules if they do not comply with our policies.

We also maintain physical, electronic and procedural safeguards to protect Information; these safeguards comply with all applicable laws. Our commitment to data security involves monitoring new advances in security technology and enhancing our security architecture to ensure that we provide the highest level of privacy and safety available for investment services firms and their customers.