

## PRIVACY DISCLOSURE DOCUMENT

**The Retirement Planning Group, Inc.**  
**11512 W. 119th Street**  
**Overland Park, Kansas 66213**

The Retirement Planning Group's primary client goal is to protect your privacy. We recognize that protecting our clients' privacy and security is an important responsibility. We also know that you expect us to service your needs in an accurate and efficient manner. To do so, we must collect and maintain certain personal information about you. The Retirement Planning Group wants you to understand how we protect your privacy, when we collect and use information about you, and the steps we take to safeguard that information.

### **Privacy Disclosures**

To conduct regular business, we may collect nonpublic personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us, our affiliates, or others
- Information from authorized representatives such as your attorney or CPA

**The Retirement Planning Group shares nonpublic information solely to service our client accounts. We do not disclose any nonpublic personal information about our clients, prospective clients or former clients to anyone, except as permitted by law.**

To provide the utmost in service, we may disclose the information below regarding clients, prospective clients and/or former clients, as necessary, to companies to perform certain services on our behalf, or as required by law.

- Information the firm receives from clients on applications (name, social security number, address, assets, etc.)
- Information about client transactions with our firm or others (account information, payment history, parties to transactions, etc.)

At times, we may disclose nonpublic personal information to affiliated third parties. We may share any of the information that we collect as described above. We may disclose nonpublic personal information about you to the following types of affiliated third parties:

- Financial service providers such as institutional custodians, mortgage brokers, insurance companies, or broker dealers

### **Information Safeguarding**

The Retirement Planning Group will internally safeguard your nonpublic personal information by restricting access to only those employees who provide services to you or those who need access to your information to service your account(s). In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.