

**Fidelis Financial Planning, LLC**  
**42 Portwest Ct., Saint Charles, MO 63303**

**PRIVACY POLICY**

As required by applicable law, we deliver a Privacy Policy to all of our clients upon establishing a relationship with them and annually thereafter, in order for our clients to understand how we use the information we gather from them.

When performing services for clients, we may collect non-public personal information such as:

- Information received in conversations, discussions and interviews.
- Information received on applications, forms, or other written documents.
- Information received from third parties on a client's behalf.

This information may include name, address, social security number, assets, etc. Although our own outside service providers may have access to your information for normal operational purposes (e.g. offsite electronic file storage, etc.), it is our policy not to disclose any non-public personal information about any client or former client except as may be required or permitted by law, or except as otherwise detailed in this policy. We may also use certain artificial intelligence tools (AI) for various business or client related purposes (such as recording and summarizing meetings), but we have strict policies related to the use of AI including the tools which may be used and the use and retention of results, and we allow client to opt out of meeting recordings.

Disclosures which may be permitted may include the following:

- Instances where a client or former client has authorized us to work with service providers such as attorneys, accountants, and other investment advisors.
- Instances where a client or former client has authorized us to disclose information to third parties that assist in processing client transactions or in servicing client accounts.
- Instances where required by law (e.g. courts, government entities, regulators, etc).

Clients and former clients may opt out from our sharing of information with most of the aforementioned outside parties by notifying us by telephone, mail, fax, email or in person.

We take our responsibility to protect the privacy of our current and former clients and their information very seriously. In addition to this privacy policy, we maintain physical, electronic, procedural and other safeguards in order to protect all client information from unauthorized access, as well as to detect and respond to security breaches. Should a breach occur, our policy is to notify affected individuals when required within 30 days of discovery.

If you have any questions about our practices, or more specifically about our privacy policy, please contact us at (636) 922-9252 and we will be happy to give you additional details.