The *Relaxing* Retirement Coach Privacy Policy

Facts	**What does The *Relaxing* Retirement Coach, Inc. (RRC) do with your financial information?**
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depends on your investment holdings and accounts which we help you manage. This information can include: • Social Security number and income • Account balances and assets • Transaction history
How?	All financial companies need to share customers' personal information to perform their services and run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons RRC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does RRC share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s) or respond to court orders and legal investigations	Yes	No
For our marketing purposes to you— to offer our services to you	Yes	Yes
For joint marketing with affiliates	No	We don't share
For joint marketing with non-affiliates	No	We don't share
For our affiliates' everyday business purposes— information about your transactions, accounts, etc.	No	We don't share
For non-affiliates' (accountants, attorneys and other business professionals) everyday business purposes— information about your accounts and transactions, as necessary	Yes (with your approval)	Yes
For our affiliates to market to you	No	We don't share
For our non-affiliates to market to you	No	We don't share

Questions?	Call (781) 235-7550

Who we are	
Who is providing this notice?	The *Relaxing* Retirement Coach, Inc. 80 William St., Suite 260 Wellesley, MA 02481

What we do	
How does RRC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards (such as password protection or encryption) and restricting access to physical files (such as locked cabinets or building).
How does RRC collect my personal information?	We collect your personal information, for example, when you: • Provide us with information about your investment or retirement portfolio or earnings • Enter into an investment advisory contract • Seek advice about your investments • Open an account • Deposit money We also collect your personal information from other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only: • Sharing for affiliates' everyday business purposes • Affiliates from using your information to market to you • Sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions	
Affiliates	Companies related by common ownership and/or control. They can be financial and nonfinancial companies.
Non-affiliates	Companies not related by common ownership and/or control. They can be financial or nonfinancial companies.
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or service to you.

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