Rev ***July 8, 2026***

FACTS	WHAT DOES SAFE HARBOR RETIREMENT PLANNERS DO WITH CUSTOMER INFORMATION?
Why?	Financial companies choose how they share your Customer 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 Customer Information. Please read this notice carefully to understand what we do.
What?	The types of Customer Information we collect, and share depend on the product or service you have with us. This information can include: • Social Security number and income • Account balances and payment history • Any data or analysis derived from this information
How?	All financial companies need to share Customer Information to run their everyday business. In the section below, we list the reasons financial companies can share Customer Information; the reasons we choose to share; and whether you can limit this sharing.

Reasons we can share your Customer Information	Do we share?	Can you limit this sharing?
For our everyday business purposes (Regulation S-P §248.14-248.15) **-** such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	Yes
For joint marketing with other financial companies – third party must be bound by confidentiality restrictions per Regulations S-P §248.13.	No	We don't share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	Yes
For our affiliates' everyday business purposes— information about your creditworthiness	No	We don't share
For our affiliates to market to you	Yes	Yes
For non-affiliates to market to you	No	We don't share
For buying, selling, or sharing of client data gathered for text messaging.	No	We don't share

To limit our sharing	• Mail the form below **Please note:** If you are a *new* customer, we can begin sharing your information from the date you received this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	Call 410-538-6800

Who we are	
Who is providing this notice?	Safe Harbor Retirement Planners
What we do	
How do we protect your Customer Information?	We maintain policies and procedures reasonably designed to safeguard customer information, including: • Administrative, technical, and physical safeguards to protect against unauthorized access or use; • Proper disposal of customer information when no longer required; • Oversight of service providers who may access or maintain customer information.
How do we collect your Customer Information?	We collect your Customer Information, for example, when you: • Open an account or deposit money
Why can't you limit all sharing?	Federal law gives you the right to limit only: • Sharing for affiliates' everyday business purposes—information about your creditworthiness • 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 you limit sharing for an account you hold jointly?	Your choices will apply to everyone on your account—unless you tell us otherwise.

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

Mail-in Form	
If you have a joint account, your choice(s) will apply to everyone on your account unless you mark below. ☐ **Apply only to me**	Mark any you want to limit: ☐ Do not use my Customer Information to market to me. ☐ Do not share information about my transactions and experiences with your affiliates. ☐ Do not allow your affiliates to use my Customer Information to market to me.

Name		Mail to: Safe Harbor Retirement Planners 4013 E Baker Avenue Abingdon, MD 21009
Address		
City, State, Zip		
Account #		