



Fort Collins Tax Service, LLC, dba  
Financial Planning Fort Collins

FACTS	WHAT DOES FINANCIAL PLANNING FORT COLLINS (“FPFoCo”) DO WITH YOUR PERSONAL 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 depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social security number and birthdate</li> <li>• Income and employment information</li> <li>• Account balances and investment experience</li> </ul> When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.	
How?	All financial companies need to share clients’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients’ personal information, the reasons FPFoCo chooses to share, and whether you can limit this sharing.	
Reasons we can share your personal information	Does FPFoCo share?	Can you limit this sharing?
<b>For our everyday business purposes</b> — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes</b> — to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	Not applicable
<b>For our affiliates’ everyday business purposes</b> — information about your transactions and experience	No	Not applicable
<b>For our affiliates’ everyday business purposes</b> — information about your creditworthiness	No	Not applicable
<b>For nonaffiliates to market to you</b>	No	Not applicable
What we do		
<b>How does FPFoCo protect my personal information?</b>	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.	
<b>How does FPFoCo collect my personal information?</b>	We collect your personal information, for example, when you: <ul style="list-style-type: none"> <li>• Complete account forms or provide employment information</li> <li>• Give us contact information or open an account</li> <li>• Provide us copies of your statements</li> </ul>	
<b>Why can’t I limit all sharing?</b>	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• sharing for affiliates’ everyday business purposes — information about your creditworthiness</li> <li>• affiliates from using your information to market to you</li> <li>• sharing for nonaffiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing.	
Definitions		
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>FPFoCo does not have any affiliates and therefore does not share information with affiliates.</i></li> </ul>	
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>• <i>FPFoCo does not share information with nonaffiliates to market to you.</i></li> </ul>	
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>• <i>FPFoCo does not participate in any joint marketing arrangements.</i></li> </ul>	
Other important information		
We may share your personal information with unaffiliated third parties that we use in providing services to you, such as software vendors or website application providers. In such cases, we require strict confidentiality in our agreements with these unaffiliated third parties.		
<b>Questions?</b>	Call 970-225-0504 or go to <a href="https://www.financialplanningfortcollins.com">https://www.financialplanningfortcollins.com</a>	