



## **Privacy Policy**

Lyon Financial Planning LLC (“LFP”) recognizes that our relationships with current and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We place the highest value on the information you share with us. LFP will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. LFP will provide this privacy statement to all clients annually.

We want our clients to understand what information we collect, how we use it, and how we protect your personal information.

### Why We Collect Your Information

We gather information about you so that we can:

- Help design and implement the financial planning services we provide you, and
- Comply with the Federal and State laws and regulations that govern us.

### What Information We Collect and Maintain

We may collect the following types of “nonpublic personal information” from you: Your name, mailing and email address, phone number, date of birth, and financial information.

### What Information We Disclose

LFP is prohibited from sharing any of your non-public personal information with unaffiliated third parties without a signed statement in which you make an affirmative declaration of permission to disclose such information.

Arrangements with companies or independent contractors unaffiliated with LFP will be subject to confidentiality agreements. If LFP is compelled by law, by a court order, or by regulatory agency requirements to disclose your protected information, we will comply.

### How We Protect Your Personal Information

We restrict and limit access to client information only to those who need to carry out their business functions. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information.

### Client Correspondence

Unless you notify us in writing, LFP will add you to our electronic newsletter mailing list once you have become a client.

We may change these policies, standards and procedures at any time. If there are material changes, we will notify you.

*Effective January 1, 2024*