



ELSER FINANCIAL PLANNING, INC.

10/30/2024

As a client of Elser Financial Planning, Inc., you share both personal and financial information with us. Your privacy is important to us and we are dedicated to safeguarding your personal and financial information.

In the normal course of doing business, we typically obtain the following non-public personal information about our clients.

- Personal information regarding our client's identity such as name, address, date of birth and social security number
- Information regarding securities transactions
- Client financial information such as net-worth, assets, income bank account information and account balances

We do not sell information about current or former clients to third parties, nor is it our practice to disclose such information to third parties unless requested to do so by a client or client representative or, if necessary, in order to process a transaction, service an account or as required by law.

Elser Financial Planning will only use text (SMS) messaging as a method of communication upon your request. Text messaging opt-in data and consent are not shared with any third parties (including subsidiaries and affiliates).

To protect your personal information, we maintain physical, electronic and procedural safeguards. Our Privacy Policy restricts the use of client information and requires that it be held in strict confidence.

We are required by law to annually provide a notice describing our privacy policy. We will inform you promptly if there are changes to our policy.

In addition, if you have not met with us in the past 12 months to discuss your investments, please inform us of any life changes that would affect your investment risk tolerance.

Please do not hesitate to contact us with any questions about this notice.

Sincerely,

President, Elser Financial Planning, Inc.