PARTNERSHIP FINANCIAL LLC

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PRIVACY STATEMENT

Partnership Financial LLC is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. With your permission, we also share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf. With your permission we also share some limited information about you when responding to inquiries from the Internal Revenue Service.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. All client information stored/saved since late December 2012 is worked on and kept in a secure cloud – protected with equivalent security provided by banks for your banking information. All accesses of this data go through encrypted transmission channels as well and none is kept on the PF advisor or support PCs. Our two office LANs employ firewalls and other techniques so that data is not placed at unreasonable risk. In remote meetings we employ 128-bit secure communications between the two PCs utilized. Client files are now created and maintained in the secure cloud environment. All secured cloud information is kept backed up nightly in multiple secured (guarded and encrypted) locations.

We do not provide your personal information to mailing list vendors or solicitors.

We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state regulators may review our Company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed. Electronic data that pre-dates January of 2013 is stored on a storage drive in a space separated from our systems by a concrete wall, but within the secure spaces of Partnership Financial LLC. Once the required holding time for this historical data expires, it will be expunged from this backup server as well.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this *Privacy Statement* to you annually, in writing.

Last updated June 2016