

Lottsa Financial Services, Inc.

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Privacy Policy

In order to comply with the requirements of the Gramm-Leach-Bliley Act of 1999 as amended, I am writing this letter to inform you of our firm's privacy policy.

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications, financial statements, planning organizers, tax returns, worksheets, and other documents;
- Information gleaned during the interview process;
- Information about your transactions with us, our affiliate, or others; and
- Information we may receive from a consumer reporting agency.

We do not disclose any nonpublic personal information about our customers or former customers to any non-affiliated person or firm except as required by law. Our sole affiliate is Lottsa Tax and Accounting Services, Inc. which is majority owned by Scott Beers who is also the majority owner of this company. We simply cannot forget what we know of you and your situation when we change hats between financial planning advisor and tax professional. We restrict access to nonpublic personal information about you to those members of our firm or of our affiliate who need to know that information to provide services to you.

In the interest of facilitating our services, Lottsa Financial Services uses electronic devices, the internet, and third-party vendors to act as fund custodians, exchange information, store data and execute financial transactions. This often includes your personal data. Our firm employs measures designed to maintain data security, and we choose vendors who are committed to the same. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you have any questions about this policy, please contact me by phone or by e-mail.

Sincerely,

Scott Beers, CFP[®], E.A.
President