PRIVACY NOTICE

Merkle
RETIREMENT PLANNING

FACTS	WHAT DOES MERKLE RETIREMENT PLANNING, LLC ("MRP") 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: • Social Security Number and investment experience • Income and risk tolerance • Assets and account transactions When you are no longer our customer, we continue to share your information as described in this notice.
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information, the reasons MRP chooses to share, and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES MRP SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes – such as to process your transaction, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	MRP doesn't share
For our affiliates' everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	No	MRP doesn't share
For nonaffiliates to market you – for customers with accounts established with MRP independent financial professional *If your independent financial professional terminates their relationship with us and moves to another investment advisory firm, we or your independent financial professional may disclose your personal information to the new firm, unless you instruct us otherwise (as described below)	Yes*	Yes

WHAT WE DO	
How does MRP protect my personal information?	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.
How does MRP collect my personal information?	We collect your personal information, for example, when you: • Open an account or give us your contact information • Seek advice about your investment or tell us about your investment or retirement portfolio • Enter into an investment advisory contract • Direct us to buy or sell your securities We also collect your personal information from others, such as credit bureaus, affiliates, or other companies. or retire

Why can't I limit all sharing?	Federal law gives you the right to limit only: • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market to you • Sharing for nonaffiliates to market to you
What happens when I limit sharing for an account, I hold jointly with someone else?	Your choices will apply to everyone on your account.

DEFINITIONS	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. • Our affiliates include financial companies such as MRP Insurance LLC.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. • Nonaffiliates we may share information with include an independent financial professional's new investment advisory firm.
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • MRP does not jointly market.

TO LIMIT OUR SHARING	• Call (515) 278-4110 and ask for the Compliance Department or • Mail in the form provided at the end of this notice. If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
QUESTIONS	Call (515) 278-4110

MAIL–IN FORM	
	❑ Do not share my personal information with nonaffiliates to market their products and services to me. By completing and returning this form, I am instructing MRP to limit the personal information about me that my financial professional could disclose and take if they move to another investment advisory firm and terminate their relationship with MRP. However, I understand that MRP may disclose my name, address, telephone number, email and the account title of my accounts serviced by my financial professional to the new investment advisory firm as allowed under federal law, certain state laws, and the Protocol for Broker Recruiting. **Name:** ____________________ **Address:** ____________________ **City, State, Zip:** ____________________ **Date of Birth** ____________________
Email to:	Compliance@MerkleTeam.com
Mail To:	Attention: Compliance Merkle Retirement Planning 1860 SE Princeton Drive Grimes, IA 50111