EPG THE ESTATE PLANNERS GROUP

Client Privacy Notice

Under the SEC's Privacy of Consumer Financial Information Regulation (Regulation S-P), we are required to notify our clients regarding the following:

1. The Estate Planners Group, LLC. Collects and records nonpublic personal information about you and your investment assets, and in some instances, estate plans, before and during the period that you are a client of the firm. Such information includes, for example, your name, address, social security number, and date of birth; names of family members and professional service providers; information on your financial needs and income; and a listing of your various assets.

2. This information is collected from you to provide you with the efficient, prudent, and appropriate investment advisory services that are specified in The Estate Planners Group, LLC Personalized Management Agreement. This information is not shared with any third parties without you specific verbal or written direction. An example of such information sharing would be the release of information required by insurance companies writing an annuity for you at your direction.

3. We do not release any nonpublic information about our clients or former clients to anyone, except as permitted by applicable law, required by regulation, as authorized by the client, or as may be required to provide advisory services as contracted.

4. It is the policy of The Estate Planners Group, LLC. to exercise precaution and diligence in protecting personal client information from being released to any third party that is not authorized by the client verbally or in writing. Our electronic and hand-recorded nonpublic personal information, including account trading information, correspondence, and brokerage and insurance documents, is not normally taken off our company's premises, nor can it be released to any third party, except to a client's designated securities broker. Employees of our firm are allowed to access electronic information from the Internet from various locations away from The Estate Planners Group, LLC office (e.g., when visiting clients at their residence or place of work). An employee may also take client information home for work purposes, but must return it promptly to the office files. Disclosure rules apply to both on- and off-premises nonpublic personal information.