



# Milestone Educators

## Privacy Policy

Milestone Educators LLC (ME LLC) is bound by federal law that gives clients the right to limit some but not all sharing of nonpublic personal information (NPI). It also requires us to tell you how ME LLC collects, shares, and protects your NPI. Please read this notice carefully to understand what we do.

### **TYPES OF NONPUBLIC PERSONAL INFORMATION ME LLC COLLECTS**

ME LLC collects NPI about you that is either provided to us by you, obtained from Sound Planning Group (SPG), or obtained by us with your authorization. This can include but is not limited to your mobile phone and email address.

### **REASONS WHY ME LLC COLLECTS YOUR NONPUBLIC PERSONAL INFORMATION**

We collect your information to:

- Send details about our workshops.
- Provide educational materials on Medicare, Social Security, and retirement planning.

### **PARTIES TO WHOM SPG DISCLOSES INFORMATION**

ME LLC shares your NPI with SPG whose use of your information is required to respond to your request for contact. ME LLC provides services to:

- Offer Medicare plans
- Retirement Planning
- Social Security & Long Term Care
- Essential SaaS providers
- Service providers that protect your NPI
- Local, state and federal enforcement agencies (upon request)

SPG is an affiliate of ME LLC

**FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SOME SHARING**

Reasons we can share your NPI	Does ME LLC Share?	Can You Limit Sharing?
For our everyday business purposes – such as to maintain the information you provide, respond to court orders and legal investigations.	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	No
To solicit reviews from clients - Responses to these requests may be used by ME LLC in marketing materials and other communications, and in so doing, ME LLC may identify the applicable person(s) as a current or former client of ME LLC..	Yes	Yes - until the second day after leaving a review.
For joint marketing with other educational or financial companies.	No	We don't share
For our affiliates' everyday business purposes – about your creditworthiness	Yes	Yes
For our affiliates' everyday business purposes - information about your contact information.	Yes	No
For non-affiliates' everyday business purposes – information about your creditworthiness	No	We don't share
For our affiliates to market to you	Yes	Yes
For non-affiliates to market to you	No	We don't share

State laws and individual companies may give you additional rights to limit sharing.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Our affiliates are Sound Planning Group, Inc and SPG Advisors LLC.
Non-Affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

**INFORMATION BY TEXT VIA MOBILE NUMBER**

We need your consent to send text messages. On any forms where we ask for your mobile number, you'll have the option to agree to receive text messages. If you decide later that you no longer want to receive texts, simply reply "Stop" to opt out. Message frequency may vary, standard data rates may apply, and carriers are not responsible for undelivered messages. No mobile information will be shared with third parties/affiliates, other than those listed in the disclosure, for marketing/promotional purposes.

**WHEN AND TO WHOM WILL YOUR INFORMATION BE SHARED?**

If you are a new customer, ME LLC may begin sharing your NPI within 30 days of providing your contact information to us. When you are no longer our customer, ME LLC may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing according to your rights listed above.

**PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S NPI**

To protect your NPI from unauthorized access and use, ME LLC uses security measures that comply with federal law. These measures include electronic data encryption, management of data access, physical security for devices and paper documents, internal procedures, and secure disposal of data, devices, and paper records.



Your privacy, our professional ethics, and the ability to provide you with quality services are very important to us. If you choose to limit sharing, please notify us immediately by calling our office at 425-943-9142, sending an email to [hello@MilestoneEducators.com](mailto:hello@MilestoneEducators.com), or mailing the form below to our office.

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Opt Out Mail in Form	
Your name: _____	
Your Address: _____	
<p>Mark any/all you want to limit:</p> <p><input type="checkbox"/> Do not share my personal information about my creditworthiness affiliates for their everyday business purposes.</p> <p><input type="checkbox"/> Do not share my personal information with SPG.</p> <p><input type="checkbox"/> Do not share my personal information with affiliates to market their services and products to me.</p> <p><input type="checkbox"/> Do not identify me as a client with your firm when I leave a review online.</p> <p><input type="checkbox"/> Do not share my personal information with non-affiliates to market their services and products to me.</p>	
Mail to:	<p>Milestone Educators LLC          11411 NE 124th St Suite 255          Kirkland, WA 98034</p>