PRIVACY POLICY OF OXFORD PLANNING GROUP, LLC

At Oxford Planning Group, LLC, protecting your privacy is very important to us. We value your trust and we want you to understand what information we collect, how we protect it, and how we use it. We treat personal information – nonpublic information that identifies you – with respect, and in accordance with this Privacy Policy.

Some of our business relationships with outside companies restrict the sharing of personal information with others. If you have obtained services through one of these relationships and we have agreed with that outside company not to share information about you, we will follow those privacy and data sharing restrictions.

We will tell current clients our Privacy Policy annually and whenever it changes.

We will maintain physical, electronic and procedural safeguards to protect any personal information we obtain about our customers.

We will not share personal financial information with outside companies unless we have provided you with an opportunity to opt out of such sharing, except as permitted by law.

We will honor an opt-out request at any time, and we will remind current customers annually of this choice.

We will require other servicing companies to whom we disclose personal information to adhere to our Privacy Policy standards.

We will give you additional disclosures or obtain your authorization when required by applicable state law.

I. CATEGORIES OF INFORMATION WE COLLECT

We at Oxford Planning Group, LLC collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms (i.e., investment statements from other investment companies);

- Information we receive from you in order to prepare your financial plan or investment allocations. This information may include statement of accounts, investment statements, mortgage statements and insurance documents;Information we receive from you on legal documentation (i.e., Last Will and Testament and Trust documents); and
- Information we receive from outside sources such as Social Security Administration.

II. CATEGORIES OF INFORMATION WE DISCLOSE

We at Oxford Planning Group, LLC may disclose the following kinds of nonpublic personal information about you as described above:

- Information we receive from you on applications or other forms such as your name, address, social security number, date of birth, assets, asset level and/or income level;
- Information we collect to prepare your financial plan or investment allocations. This information may include statements of accounts, investment statements, mortgage statements and insurance documents; and
- Information we receive from outside sources such as Social Security Administration.

III. CATEGORIES OF INFORMATION WE DISCLOSE AND PARTIES TO WHOM WE DISCLOSE

We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted by law or by written authorization from clients.

IV. CATEGORIES OF PARTIES TO WHOM WE DISCLOSE

We may disclose nonpublic personal information about you to the following types of third parties upon approval by client by written application or letter of authorization:

- Financial services providers, such as other investment advisers, outside custodians, broker/dealers, life insurance agents, banks, etc.

V. CONFIDENTIALITY AND SECURITY

We at Oxford Planning Group, LLC restrict access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you. All associates sign privacy agreements. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.