PRIVACY NOTICE

Rev. July 2026

WWW.MYLIFEPLANFINANCIAL.COM

LIFEPLAN
Financial Design, Inc.

FACTS	WHAT DOES LIFEPLAN FINANCIAL DESIGN, INC. (“LIFEPLAN”) 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 • Retirement assets and account transactions
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 LifePlan chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES LIFEPLAN SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes – such as to process your transactions, 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**	**We don’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**	**We don’t share**
For nonaffiliates to market to you – for clients with accounts established with a LifePlan independent financial professional ** If your independent financial professional terminates their relationship with us and moves to another investment advisory firm,*	**Yes***	**Yes**

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES LIFEPLAN SHARE?	CAN YOU LIMIT THIS SHARING?
we or your independent financial professional may disclose your personal information to the new firm, unless you instruct us otherwise (as described below).		

TO LIMIT OUR SHARING	• Call (517) 323-7526 and ask for LifePlan's Operations Department, or • Mail in the form provided at the end of this notice. **Please note:** 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 (517) 323-7526 or email team@mylifeplanfinancial.com

✂ MAIL-IN FORM

Mark if you want to limit:

☐ Do not share my personal information with nonaffiliates to market their products and services to me.

Name: ____

Address: ____

City, State, Zip: ____

Date of Birth: ____

Mail to:

Attn: Operations
LifePlan Financial Design, Inc.
2174 Commons Parkway
Okemos, MI 48864

WHAT WE DO	
How does LifePlan 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 LifePlan 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 investments 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.
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 State laws and individual companies may give you additional rights to limit sharing.
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 Stewards Wealth Planning, LLC.*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • *Nonaffiliates we may share information with include an independent representative's new investment advisory firm.*
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • *LifePlan doesn't jointly market.*

OTHER IMPORTANT INFORMATION

Call Monitoring and Recording. If you communicate with us by telephone, we may monitor or record the call.