

# PRIVACY POLICY NOTICE



## WHO IS PROVIDING THIS NOTICE? Chesapeake Financial Planners

Rev. 2026 | This notice describes our privacy practices and your rights under federal and state law.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES CFP 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.	No	We do not share
For joint marketing with other financial companies.	No	We do not share
For our affiliates' everyday business purposes – information about your transactions and experiences.	No	We do not share
For our affiliates' everyday business purposes – information about your creditworthiness.	No	We do not share
For our affiliates to market to you.	No	We do not share
For our non-affiliates to market to you.	No	We do not share

### How does CFP protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These include computer safeguards, secured files and buildings, restricted employee access, and regular training.

### How does CFP collect my personal information?

We collect your personal information, for example, when you:

- Open an account or provide contact information
- Enter an investment advisory contract or seek financial planning assistance
- Tell us about your investment or retirement portfolio
- Interact with our website or online services

We also collect your personal information from other companies you transact business with through CFP.

### Why can't I limit all sharing?

Federal law gives you the right to limit only:

- Sharing for affiliates' everyday business purposes—info about your creditworthiness
- Affiliates from using your information to market to you
- Sharing with non-affiliates so they can market to you

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

### Definitions

**Affiliates:** Companies related by common ownership or control. Chesapeake Financial Planners has no current affiliates.

**Non-affiliates:** Companies not related by common ownership or control. CFP does not share with non-affiliates so they can market to you.

**Joint Marketing:** A formal agreement between non-affiliated financial companies that market products or services to you. CFP does not engage in joint marketing.

### Questions about this policy? Contact us:

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