

FACTS

WHAT DOES TRUE PARTNERS CONSULTING LLC 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 depends on the product or service you have with us. This information can include: <ul style="list-style-type: none"> • Social Security Number and Income • Account Balance and Payment • Credit History and Credit Scores
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 True Partners Consulting chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does True Partners Consulting 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	Yes	No
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 do not share
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share

Questions	Call 877-370-2969 or go to www.tpctax.com/individual-privacy-notice
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Who we are

Who is providing this notice?	True Partners Consulting LLC
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What we do

How does True Partners Consulting 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.
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How does True Partners Consulting collect my personal information?	We collect your personal information, for example, when you submit required documents for tax consulting and compliance services. We also collect your personal information from relevant third-parties only as necessary to render our services to you.
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Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ Sharing for affiliates' everyday business purposes—information about your credit worthiness ▪ Affiliates from using your information to market to you ▪ Sharing to nonaffiliates to market to you <p>State laws and individual companies may give you additional rights to limit sharing.</p>
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Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ Our affiliates include TPC 2.0 LLC, True Partners Consulting Holdings LLC, and True Partners Consulting LLC.
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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ Nonaffiliates we share with can include other financial, legal, and tax service providers.
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Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ Our joint marketing partners may include members of True Partners Consulting's network of service providers.
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Other important information

California Residents: Under California law, we will not share information we collect about you with companies outside of True Partners Consulting, unless the law allows. For example, we may share information with your consent to other service providers. We limit sharing among our companies to the extent required by California law.

Vermont Residents: Under Vermont law, we will not share information we collect about you with companies outside of our corporate family, unless the law allows. For example, we may share information with your consent to other service providers or joint marketing partners.