Privacy Policy for Inflection Advisors
As of January 3, 2020

Inflection Business Consulting, Inc. DBA- Inflection Advisors recognizes that our relationships with current and prospective clients are based on integrity and trust. We work hard to maintain your privacy and to preserve the private nature of our relationship with you. We place the highest value on the information you share with us. Inflection Advisors will not disclose your personal information to anyone unless it is required by law or at your direction. We will not sell your personal information. Inflection Advisors will provide the privacy statement to all clients annually.

We want our clients to understand what information we collect, how we use it, and how we protect it responsibly.

Why We Collect Your Information

We gather information about you so that we can:

- Help design and implement the investment and planning related services we provide you; and
- Comply with the Federal and State laws and regulations that govern us.

What Information We Collect and Maintain

We may collect the following types of “nonpublic personal information” about you:

- Information from our initial meeting or subsequent consultations about your identity, such as your name, address, social security number, date of birth, and financial information.
- Information that we generate to service your financial needs.
- Information that we may receive from third parties with respect to your financial profile.

What Information We Disclose

We are permitted by law to disclose nonpublic information about you to unaffiliated third parties in certain circumstances. For example, in order for us to provide planning or investment management services to you, we may disclose your personal information in limited circumstances to various service providers, such as our clearing firm, TD Ameritrade Institutional. If the Financial Planner/Financial Advisor leaves Inflection Advisors to join another firm, he or she may be permitted to retain copies of client information so that they can assist with the transfer of client accounts and continue to serve the client at their new firm.

“Opting-Out” of Third Party Disclosures: If you do not want your Financial Planner/Financial Adviser to retain copies of your client sensitive information when he or she leaves us to join another firm, you may contact us by calling the main telephone line at: 424-326-3093

Otherwise, Inflection Advisors will not disclose any personal information about you or your account(s) unless one of the following conditions is met:

- We receive your prior written consent; or
- We have documentation that the recipient is your authorized representative; or
- We are required by law to disclose information to the recipient

Arrangements with companies not affiliated with Inflection Advisors will be subject to confidentiality agreements.

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How We Protect Your Personal Information

Privacy has always been important to Inflection Advisors. We maintain physical, electronic, and procedural safeguards to protect your confidential personal information.

Our use of Microsoft 365 OneDrive ensures that our client files have an Advanced Encryption Standard (AES) with 256-bit keys and is Federal Information Processing Standard (FIPS) 140-2 compliant.

We have a partnership with WealthBox for client relationship management. Our use of the cloud-based management tool requires that their storage of data has a bank standard level of encryption. The data centers they use are hosted by Amazon Web Service which have the highest standards of operating data center.

In addition to Wealthbox, our firm utilizes financial planning software by eMoney. This software provides a secure vault for client documents to be shared and stored. They use a 256 bit Secure Socket Layer to scramble data. This is among the highest encryption in the industry and twice the encryption amount used by many other financial institutions.