



Privacy Statement for Strategic Plan Consultants LLC

Effective Date: January 1, 2025

Strategic Plan Consultants LLC ("we," "our," or "the Company") is committed to protecting your privacy and ensuring that your personal information is handled safely and securely. This Privacy Statement outlines how we collect, use, and safeguard your personal information in compliance with applicable data protection laws and regulations, including the General Data Protection Regulation (GDPR), the California Consumer Privacy Act (CCPA), and other relevant laws.

By engaging with our services, visiting our website, or otherwise providing us with your personal information, you consent to the practices described in this Privacy Statement. If you do not agree with our privacy practices, please refrain from using our services or submitting personal information to us.

1. Information We Collect

We collect personal information in various ways, including when you visit our website, interact with our online services, or engage with our business consulting services. The types of personal information we may collect include:

- **Contact Information:** Name, email address, phone number, company name, job title, and address.
- **Business Information:** Information about your company, business operations, financial information, and other business-related data.
- **Usage Data:** Information about your interactions with our website, such as IP address, browser type, pages visited, time spent on the site, and other usage statistics.
- **Communication Data:** Any personal information you provide when you contact us, including inquiries, feedback, or support requests.

We do not collect sensitive personal information unless required by law or if you voluntarily provide it.

2. How We Use Your Information

We use the information we collect for the following purposes:

- **Providing Services:** To deliver business consulting services, respond to inquiries, and communicate with you regarding our services.
- **Improving Services:** To improve our services, website functionality, and user experience.
- **Marketing and Communication:** To send you newsletters, promotional materials, or information about our services (you may opt out of these communications at any time).
- **Compliance:** To comply with legal obligations and protect our business interests.
- **Analytics:** To analyze website traffic and usage patterns to improve our website and services.

3. How We Share Your Information

We do not sell, trade, or rent your personal information to third parties. However, we may share your personal information in the following circumstances:

- **Service Providers:** We may share your information with trusted third-party service providers who perform functions on our behalf, such as payment processing, data analysis, and website hosting. These service providers are required to handle your personal information in compliance with applicable privacy laws.
- **Legal Requirements:** We may disclose your information to comply with legal obligations, respond to legal requests, or protect our rights, property, or safety, as well as the rights, property, or safety of others.
- **Business Transfers:** In the event of a merger, acquisition, or sale of assets, your personal information may be transferred to the new entity.

We will not share your personal information with any other third parties without your explicit consent unless required by law or as described in this Privacy Statement.

4. Data Retention

We retain your personal information only for as long as necessary to fulfill the purposes for which it was collected, to comply with legal obligations, and to resolve disputes. When your personal information is no longer required, we will securely delete or anonymize it.

5. Your Rights

Depending on your location and applicable data protection laws, you may have the following rights regarding your personal information:

- **Access:** You may request access to the personal information we hold about you.
- **Correction:** You may request that we correct any inaccurate or incomplete personal information.
- **Deletion:** You may request that we delete your personal information, subject to certain legal exceptions.
- **Portability:** You may request a copy of your personal information in a structured, commonly used, and machine-readable format.
- **Objection:** You may object to the processing of your personal information for specific purposes, such as direct marketing.
- **Withdrawal of Consent:** If we rely on your consent for processing your personal information, you may withdraw your consent at any time.

To exercise any of these rights, please contact us using the contact information provided below.

6. Security of Your Information

We take reasonable technical and organizational measures to protect the personal information we collect from unauthorized access, alteration, disclosure, or destruction. However, please note that no method of transmission over the internet or electronic storage is completely secure, and we cannot guarantee the absolute security of your personal information.

7. Cookies and Tracking Technologies

Our website may use cookies and other tracking technologies to enhance user experience, analyze website usage, and deliver personalized content. You may control the use of cookies through your browser settings, but please note that disabling cookies may affect your ability to use some features of our website.

8. International Data Transfers

If you are located outside the country in which our company is based, please be aware that your personal information may be transferred to, stored, and processed in countries that may have different data protection laws. We take appropriate measures to ensure that your personal information is handled securely and in accordance with this Privacy Statement.

9. Changes to This Privacy Statement

We may update this Privacy Statement from time to time to reflect changes in our practices or for other operational, legal, or regulatory reasons. Any updates will be posted on our website, and the effective date of the latest version will be clearly indicated. We encourage you to review this Privacy Statement periodically.

10. Contact Us

If you have any questions or concerns about this Privacy Statement or how we handle your personal information, please contact us at:

Strategic Plan Consultants LLC

contact@spcretirement.com

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