



Privacy Policy Notice

Fractal Financial Design, LLC is committed to safeguarding your personal information. This notice outlines our privacy practices as required under Regulation S-P.

Information We Collect

We collect nonpublic personal information (NPI) about you, including:

- Name, address, date of birth, and Social Security number
- Financial account numbers and balances
- Income, tax, and investment history

This information is collected directly from you during account setup, financial planning, or tax preparation.

How We Use and Share Information

We use your information only to provide financial, investment, or tax services to you. We do not sell your information. We may share information with third parties only as permitted or required by law. Examples include:

- Your account custodian (Charles Schwab & Co.)
- Our service providers (e.g., BridgeFT)
- Regulators, if legally required

How We Protect Your Information

We maintain strong safeguards to ensure your information remains secure:

- Encrypted data storage and secure communications
- Password-protected systems and device access
- Limited access to personal data by authorized personnel only

Your Rights

You may request a copy of this Privacy Policy at any time. We provide this notice to all clients annually and update it as needed to reflect changes in our practices or the law. If you have any questions or concerns, please contact Brett Thomas at brett@fractalfinancialdesign.com.