



# PROSPERITY PLANNING & ADVISORY

## Privacy Policy

**Effective Date:** April 12, 2026

Prosperity Planning & Advisory, LLC ("Prosperity Planning," "we," "us," or "our") respects your privacy and is committed to protecting the personal information you provide through our website.

This Privacy Policy applies to information collected through our website and related online services, including contact forms, appointment request tools, chat features, and other online interactions. This policy is intended for website visitors and prospects. It does **not** replace any separate client privacy notice provided in connection with an advisory relationship.

### 1. Information We Collect

We may collect the following categories of information through the website:

- **Identifiers and contact information**, such as your name, email address, telephone number, mailing address, and other information you choose to provide.
- **Inquiry and communication information**, such as the contents of messages you submit through forms, chat features, scheduling tools, or email links.
- **Professional or financial context you choose to provide**, such as general information about your financial goals, interests, or reason for contacting us.
- **Internet or device activity information**, such as IP address, browser type, device type, operating system, referring pages, pages viewed, dates and times of visits, and similar website usage information.
- **Cookies and similar technologies data**, to the extent such technologies are used on the website.

We do not ask website visitors to submit Social Security numbers, account numbers, or other highly sensitive financial information through general website forms unless specifically indicated through a secure process. You should not submit sensitive personal or financial information through general website forms or chat features unless specifically requested through a secure method.

### 2. How We Collect Information

We collect information:



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- directly from you when you fill out a form, schedule an appointment, use a chat feature, or otherwise contact us;
- automatically through your use of the website, including through cookies, server logs, analytics tools, and similar technologies; and
- from service providers that help us operate the website and related tools.

### **3. How We Use Information**

Information provided through this website, including forms and chat features, is for general informational and communication purposes only and does not constitute personalized investment, legal, or tax advice. Submitting information through the website does not establish an advisory relationship.

We may use personal information collected through the website to:

- respond to inquiries and communicate with you;
- schedule consultations or appointments;
- provide information about our services;
- operate, maintain, secure, and improve the website;
- analyze website usage and performance;
- detect, prevent, and respond to fraud, misuse, security incidents, or other technical issues;
- comply with legal, regulatory, and recordkeeping obligations; and
- otherwise use the information as permitted or required by law.

We do not sell personal information as defined under applicable law, including the California Consumer Privacy Act (CCPA).

### **4. Cookies, Analytics, and Similar Technologies**

The website may use cookies, pixels, tags, scripts, or similar technologies to support functionality, understand traffic patterns, improve user experience, evaluate website performance, and help us better understand the effectiveness of our online content.

These tools may collect information such as IP address, browser type, device identifiers, pages visited, time spent on pages, referring websites, and interaction data.

The website currently uses or may use the following tools:



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- **Calendly** for appointment scheduling and related booking functions;
- **Google Analytics** to understand website traffic and visitor behavior;
- **Meta Pixel** to measure advertising performance, better understand website activity, and support remarketing or audience-building features, if enabled. We do not use website-collected information to advertise based on sensitive financial information, and we do not share client financial data for advertising purposes; and
- **Microsoft Copilot or related Microsoft chat tools** to provide chat or interactive website assistance.

These third-party providers may collect information directly from your browser or device when you interact with the website. Their use of information is governed by their own privacy policies and terms.

You may be able to control cookies through your browser settings or other available tools. Disabling certain cookies or tracking technologies may affect website functionality.

## 5. How We Share Information

We limit the collection and sharing of personal information to what is reasonably necessary for the purposes described in this Privacy Policy.

We may disclose website-collected information to:

- **service providers** that help us host, maintain, secure, analyze, or operate the website and related features;
- **communication, scheduling, analytics, advertising, or technology vendors** that assist with forms, appointment booking, chat, website analytics, advertising measurement, email delivery, or similar services;
- **professional advisers** such as attorneys, accountants, auditors, or compliance consultants, when reasonably necessary;
- **governmental, regulatory, or law enforcement authorities** when required by law, subpoena, court order, examination, or other legal process; and
- **successors or assigns** in connection with a merger, acquisition, reorganization, or sale of all or part of our business, subject to applicable law.

We do not disclose website visitor information to nonaffiliated third parties for their own independent marketing purposes.



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## **6. Do Not Track and Global Privacy Controls**

Some browsers offer a "Do Not Track" setting. Because there is not currently a universally accepted standard for responding to Do Not Track signals, the website may not respond to all such signals.

To the extent applicable law requires recognition of browser-based opt-out preference signals, we will process qualifying requests in accordance with applicable law.

## **7. California Privacy Rights**

If the California Consumer Privacy Act, as amended ("CCPA"), applies to our website data practices, California residents may have rights that can include the right to know, delete, correct, and opt out of certain sharing practices, as well as the right to limit the use of sensitive personal information in certain circumstances.

The availability of these rights depends on whether the CCPA applies to our business and the information at issue. Certain information may be exempt from the CCPA or subject to other privacy laws.

California residents who wish to make a privacy request may contact us using the contact information listed below. We may need to verify your identity before processing certain requests.

We will not discriminate against you for exercising privacy rights available under applicable law.

## **8. Data Security**

We use reasonable administrative, technical, and physical safeguards designed to protect information collected through the website from unauthorized access, use, misuse, alteration, or disclosure.

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No method of internet transmission or electronic storage is completely secure. Therefore, we cannot guarantee absolute security.

## **9. Retention**



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If you become a client, you will receive a separate Client Privacy Notice that governs how your personal financial information is collected, used, and shared in connection with the advisory relationship.

We retain website-related personal information for as long as reasonably necessary for the purposes described in this Privacy Policy, including to respond to inquiries, maintain business and compliance records, resolve disputes, enforce agreements, and comply with legal or regulatory obligations.

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## **10. Third-Party Links, Embedded Services, and External Platforms**

This website may contain links to third-party websites or use embedded tools or features operated by third parties, including scheduling tools, chat services, analytics tools, advertising tools, videos, maps, or social media integrations. We are not responsible for the privacy, security, or content practices of third-party sites or services. You should review the privacy policies of those third parties before providing information through them.

## **11. Children's Privacy**

This website is not directed to children under 13, and we do not knowingly collect personal information online from children under 13 through the website.

## **12. Changes to This Privacy Policy**

We may update this Privacy Policy from time to time. When we do, we will revise the Effective Date above. Your continued use of the website after any updated policy is posted constitutes your acknowledgment of the revised policy, to the extent permitted by law.

## **13. Contact Us**

If you have questions about this Privacy Policy or would like to submit a privacy-related request, please contact us at:



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## **Prosperity Planning & Advisory, LLC**

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### **Drafting Notes for Internal Use**

- This document is designed as a **website privacy policy only**.
- Use a **separate Client Privacy Notice** for advisory clients and prospects entering a client relationship.
- The policy has been updated to reflect the stated use of **Calendly, Google Analytics, Meta Pixel, and Microsoft Copilot chat tools**.
- Before publishing, confirm that these tools are actually active on the live site and that any cookie banner, consent tool, or platform settings are consistent with this policy.