



# Sunflower Financial Planning, LLC

## Privacy Policy

February 24, 2026

PO Box 322, Windham, NH 03087

Phone: (603) 722-0703

[www.planwithsunflower.com](http://www.planwithsunflower.com)

### Our Commitment to You

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Sunflower Financial Planning, LLC ("Sunflower Financial" or the "Advisor") is committed to safeguarding the use of personal information of our Clients (also referred to as "you" and "your") that we obtain as your investment advisor, as described here in our Privacy Policy ("Policy").

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we do everything that we can to maintain that trust. Sunflower Financial (also referred to as "we," "our," and "us") protects the security and confidentiality of the personal information we have and implements controls to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you.

Sunflower Financial does not sell your non-public personal information to anyone. Nor do we provide such information to others except for discrete and reasonable business purposes in connection with the servicing and management of our relationship with you, as discussed below.

Details of our approach to privacy and how your personal non-public information is collected and used are set forth in this Policy.

### Why You Need to Know?

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Registered investment advisors ("RIAs") must share some of your personal information in the course of servicing your account. Federal and state laws give you the right to limit some of this sharing and require RIAs to disclose how we collect, share, and protect your personal information.

## What Information Do We Collect From You?

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- Driver's license number
- Social security or taxpayer identification number
- Name, address and phone number(s)
- E-mail address(es)
- Account information (including other institutions)
- Date of birth
- Assets and liabilities
- Income and expenses
- Investment activity
- Investment experience and goals

## What Information Do We Collect From Other Sources?

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- Custody, brokerage, and advisory agreements
- Other advisory agreements and legal documents
- Transactional information with us or others
- Account applications and forms
- Investment questionnaires and suitability documents
- Other information needed to service your accounts

## How Do We Protect Your Information?

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To safeguard your personal information from unauthorized access and use, we maintain physical, procedural, and electronic security measures. These include such safeguards as secure passwords, encrypted file storage, and a secure office environment. Our technology vendors provide security and access control over personal information and have policies over the transmission of data. Our associates are trained on their responsibilities to protect Clients' personal information.

We require third-parties that assist in providing our services to you to protect the personal information they receive from us.

## How Do We Share Your Information?

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An RIA shares Client personal information to effectively implement its services. In the section below, we list some reasons we may share your personal information.

Basis For Sharing	Do We Share?	Can You Limit?
<p><i>Servicing our Clients</i> - We may share non-public personal information with non-affiliated third-parties (such as administrators, brokers, custodians, regulators, credit agencies, other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including, but not limited to: processing transactions; general account maintenance; responding to regulators or legal investigations; and credit reporting. We may also share information with the firm's designated agent for purposes of carrying out the firm's business succession plan in the event of the death or incapacity of the firm's principal.</p>	Yes	Yes - Client opt-in consent is required; however, if you do not provide or later revoke consent, we may be unable to continue providing advisory services to you
<p><i>Marketing Purposes</i> - Sunflower Financial does not disclose, and does not intend to disclose, personal information with non-affiliated third-parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where Sunflower Financial or the client has a formal agreement with the financial institution. We will only share information for purposes of servicing your accounts, not for marketing purposes.</p>	No	Not Shared

<i>Authorized Users</i> - Your non-public personal information may be disclosed to you and persons that we believe to be your authorized agent(s) or representative(s).	Yes	Yes
<i>Information About Former Clients</i> - Sunflower Financial does not disclose and does not intend to disclose, non-public personal information to non-affiliated third-parties with respect to persons who are no longer our Clients.	No	Not Shared

Under Massachusetts law, clients must “opt-in” to share non-public personal information with unaffiliated third-parties before any personal information is disclosed. It is necessary for us to disclose non-public personal information to unaffiliated third-parties to provide our advisory services to you and to meet regulatory requirements. You must provide your consent, or “opt-in,” to allow us to share your non-public information with these parties by signing below:

*I consent to sharing my non-public information as described above.*

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Signature	Date	Signature	Date
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If you give permission, you may opt out from our sharing information with these unaffiliated third-parties by notifying us at any time in writing.

### Changes to Our Privacy Policy

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We will send you a copy of this Policy annually for as long as you maintain an ongoing relationship with us.

Periodically we may revise this Policy and will provide you with a revised Policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information, other than as described in this notice, unless we first notify you and provide you with an opportunity to prevent the information sharing.

### Any Questions?

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You may ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting us at (603) 722-0703.