

**MORRIS FINANCIAL CONCEPTS, INC. (“MFC”) Rev. 03/2025**  
**PRIVACY POLICY NOTICE**

<b>FACTS</b>	<b>WHAT DOES Morris Financial Concepts, INC “MFC” DO WITH YOUR PERSONAL INFORMATION?</b>
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<b>Why?</b>	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
<b>What?</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>Social Security number, name, e-mail, address, phone number, birth date and assets</li> <li>Account balances and transaction history.</li> <li>Wire transfer instructions and risk tolerance.</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
<b>How?</b>	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons MFC chooses to share; and whether you can limit this sharing.

Reasons we can share your information	Does MFC share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes –</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We don’t share
<b>For our affiliates’ everyday business purposes –</b> information about your transactions and experiences	Yes	Yes
<b>For our affiliates’ everyday business purposes –</b> information about your creditworthiness	No	We don’t share
<b>For our affiliates to market to you</b>	No	We don’t share
<b>For non-affiliates to market to you</b>	No	We don’t share
<b>To limit our sharing</b>	Call (843)884-6192 <b>Please note:</b> If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.	

<b>Questions?</b>	Call (843)884-6192 or go to <a href="http://www.mfcplanners.com">www.mfcplanners.com</a>
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What we do	
<b>How does MFC protect my personal information?</b>	MFC restricts access to non-public personal information about you to those individuals who need to know that information to provide products or services to you and perform their respective duties. MFC maintains physical, electronic and procedural security measures to safeguard confidential client information.
<b>How does MFC collect my personal information?</b>	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Open an account or seek advice about your investments</li> <li>• Deposit money</li> <li>• Enter into an investment advisory client agreement</li> <li>• Make a wire transfer or direct us to buy securities</li> </ul> <p>We also collect your personal information from other companies.</p>
<b>Why can't I limit all sharing?</b>	<p>Federal Law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for non-affiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account – unless you tell us otherwise.

Definitions	
<b>Affiliates</b>	<p>Companies related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> <li>• <i>MFC is affiliated with Morris Tax Planning, LLC.</i></li> </ul>
<b>Non-affiliates</b>	<p>Companies not related by common ownership or control. They can be financial and non-financial companies.</p> <ul style="list-style-type: none"> <li>• <i>MFC does not currently share with non-affiliates so they can market to you.</i></li> </ul>
<b>Joint marketing</b>	<p>A formal agreement between non-affiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>• <i>MFC does not jointly market.</i></li> </ul>