



Privacy Policy

TVFP LLC • dba Treasure Valley Financial Planning
Effective Date: July 27, 2026

FACTS INFORMATION? WHAT DOES TVFP LLC DO WITH YOUR PERSONAL INFORMATION?

Why?	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.
How?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: ▪ Social Security number and income ▪ Account balances and transaction history ▪ Investment experience and account transactions <i>When you are no longer our customer, we continue to share your information as described in this notice.</i>
What?	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 customer's personal information, the reasons TVFP chooses to share, and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES TVFP SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes — to offer our products and services to you.	Yes	No
For joint marketing with other financial companies.	No	<i>We don't share</i>
For our affiliates' everyday business purposes — information about your transactions and experiences.	No	<i>We don't share</i>
For our affiliates' everyday business purposes — information about your creditworthiness.	No	<i>We don't share</i>



For nonaffiliates to market to you.	No	We don't share
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Questions?	Call (208) 789-0888 or visit www.treasurevalleyplanning.com .
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WHO WE ARE

Who is providing this notice?	TVFP LLC dba Treasure Valley Financial Planning.
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WHAT WE DO

How does TVFP protect my personal information?	To protect your personal information from unauthorized access and use, we maintain administrative, technical, and physical safeguards that comply with federal law, oversee service providers that handle your information on our behalf, and maintain a written incident response program. If your sensitive personal information is accessed or used without authorization, we will notify you no later than 30 days after becoming aware of the incident, as required by federal law.
How does TVFP collect my personal information?	We collect your personal information, for example, when you: ▪ Open an account or give us your income information ▪ Tell us about your portfolio or deposit money ▪ Enter into an investment management agreement or financial planning agreement We also collect your personal information from others, including custodians, and other professional service providers (such as your CPA, attorney, or insurance agent) when authorized by you.
Why can't I limit all sharing?	Federal law gives you the right to limit only: ▪ Sharing for affiliates' everyday business purposes—information about your creditworthiness ▪ Affiliates from using your information to market to you ▪ Sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

DEFINITIONS



Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <i>We have no affiliates.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <i>TVFP does not share with nonaffiliates so they can market to you.</i>
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <i>TVFP does not jointly market.</i>

ADDITIONAL INFORMATION

Meeting and Call Recording	As part of our service to you, meetings and calls with our team may be recorded, including through the use of AI-assisted note-taking technology, to help us maintain accurate records of our conversations and provide better service. Recordings and transcripts are retained consistent with our recordkeeping practices.
Text Message Communications	We are committed to safeguarding the personal information collected through text message communications. We do not sell, rent, share, or disclose this information to third parties without your prior consent or as required by law. Any information shared with third parties is strictly to fulfill our obligations to you. We will never share personally identifiable information with third parties for marketing purposes. If you would like to stop receiving text messages from us, simply reply "STOP" or "UNSUBSCRIBE" to the number that sent you the message.