

Bulldog Financial Planning Privacy Policy

Bulldog Financial Planning LLC is a Single Member Limited Liability Company that is committed to protecting the privacy of every client. Your privacy is a top priority of my company. My firm is required by law to provide you with this privacy notice to explain the Privacy Policy and how I collect, use and safeguard your personal financial information. If you have any questions after reading this notice, please contact me at (401) 227-3957.

The Information I Collect About You

- Bulldog Financial Planning LLC offers services that require me to understand your financial situation which includes investment account information, tax related information, insurance information, work benefit information, budgeting information among other relevant things.
- Bank account information may be collected upon your request for withdrawals or deposits.
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- Federally required details such as your name, address, Social Security Number, Driver's License or other information as needed from different forms of verification will be collected.
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- I will gather Contact information like a phone number, or email address.

The Bulldog Financial Planning LLC website will generate cookies and identify your location, but will not store personal information from you unless you enter your contact information on the 'Contact Us' page.

How is this information Used

The financial information will be used to generate your financial statements and the details will be used to perform analysis for my recommendations. This will also be used to help answer your questions.

The contact information will be used for purposes of scheduling our ongoing meetings to review your progress towards goals, reply to your inquiries, report to you information related to any investment account you have me manage, or send you interesting materials based on your interests.

The federally required information will be used as part of efforts to detect and prevent fraud or investigate suspicious activity. I will have to comply with legal or regulatory requirements.

When is Your Information Shared

Bulldog Financial Planning LLC acts as your Fiduciary at all times when you create a customer relationship with me. This includes the way I will not share your personal information with insurances agencies, accountants, or attorney's unless agreed upon. The information shared



with these third parties would be limited to your contact information including your name, telephone number, email address, and a description of the request.

Upon applying for a managed investment account of any kind, your personal information will also be stored with the designated custodian and broker dealer; however, the custodian and broker dealer has its own privacy policy separate from this one.

I will need to comply with government authorities upon their requests for information.

Financial Planning Software and AI Usage

Bulldog Financial Planning uses financial planning software that stores personal information. This information is used to develop reports that illustrate financial planning concepts including tax planning calculations, cash flow planning, and monte carlo simulations that indicate the probability of success for retirement scenarios. The software used may incorporate some use of AI within the applications, such as automated cash flow analysis.

For your privacy and protection, your personal identification information is not shared or used in conjunction with any individual AI application such as ChatGPT, Grok, Co-Pilot, Claude, Gemini, or Perplexity.

Other uses of AI include developing social media post ideas and creative pictures of Butch and Tank, efficiency with note taking during meetings and creating summaries. AI is used to collect publicly available information on companies and earnings announcements.

You have the option to opt out of AI use at Bulldog Financial Planning. Please let me know if you want to Opt out. You can modify this decision at any time. Zoom AI can be turned off and we do not have to use AI applications within the planning software; however, certain tasks may be more efficient when using AI.

We continue to rely upon the privacy policies of each financial planning software provider. Please reach out for more information.

When Visiting the Bulldog Financial Planning Website - Links to Social Media

The Bulldog Financial Planning LLC website contains links to social media pages created for the company such as LinkedIn, Instagram, Facebook. Other sites have me listed on their search engines like the Garrett Planning Network, CFP.net, NAPFA, and there is a page on X (Twitter). These websites are considered third-party websites and are subject to their own privacy and data protection policies and is not covered by this Privacy Policy.



Retention of Your Information

I am required to maintain customer records that include your personal information. These records will need to be maintained for as long as necessary to carry out the purposes described above and for any additional period that may be required by law.

Security

Guarding your personal information is very important to Bulldog Financial Planning LLC. The information is stored securely using my physical, electronic, and procedural safeguards that comply with federal regulations and industry practices to safeguard your personal information. We regularly review our security procedures to consider appropriate new technology and methods.

Updates to This Privacy Policy

At times updates may be necessary to this Privacy Policy. Any material change will require that I send you an official notice as well as annual copies. This could be in the way I collect, use or share your personal data. Please check this page for the latest information on our privacy practices or feel free to request an additional copy.