

The Estate Plan
1140 Financial Boulevard
Reno, Nevada 89502

NOTICE OF PRIVACY POLICY

The Estate Plan is committed to providing state of the art revocable living trusts and other estate-planning documents designed to meet your needs as requested of us and as directed and supervised in their preparation by your attorney. We are equally committed to respecting your privacy and protecting the information about you that we receive. We have prepared this notice to advise you what information we collect, how we use it and how we protect it.

WHAT INFORMATION WE COLLECT

As an essential part of our business, we obtain certain personal information about you from your attorney in order to provide an estate planning document requested of us by your attorney suitable to your specific needs and desires. Some of this information may come directly from you. Other information may come from your financial advisor, your accountant, your agent, and a member of your family or some other trusted person. The type of information we receive often includes addresses, social security number, family information, financial information and information pertaining to the particular personal situation of individual members of your family.

WHAT INFORMATION WE DISCLOSE

We do not disclose nonpublic personal information about our current or former clients to any non-affiliated person or entity, except as permitted by law. Examples of the disclosures which we are permitted by law to make include disclosures to any person who is your attorney or who is your attorney-in-fact under a Power of Attorney which specifically authorizes him or her to obtain the information on you what we keep; disclosures to other third parties made with your consent or at your direction; disclosures made in response to a subpoena or an inquire from a regulatory agency; and disclosures made to comply with federal, state or local laws and to protect against fraud.

OUR PRIVACY PROTECTION PROCEDURES

We protect information about you from unauthorized access. Our officers, employees, advisors, and agents receive training regarding our privacy policies. In all cases access to information about you is restricted to those individuals that need such information in order to provide our documentation and our services to you. Examples of activities requiring access to your personal information include: preparing documents suitable to your estate planning needs, updating those documents, and participation in the settling of your estate. Finally, we employ secure technologies in order to safeguard transmission of information about you through our website and we have established and maintain procedures to comply with all state and federal laws and regulations regarding the security of personal Information.