**Privacy Statement**

December 4, 2024

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**Seaport Financial Education LLC**

**138 Heritage Drive**  
**Portsmouth, RI 02871**  
**Phone: (401) 595-5511**

**Email: wdwyer@SeaportFinEd.com**  
**Website: www.SeaportFinEd.com**

At Seaport Financial Education LLC (“Seaport Financial”, “we”, “our”, or “us”), we are committed to protecting the privacy and confidentiality of your personal information. This Privacy Statement explains how we collect, use, store, and share information when you engage with our services. By accessing or using our website, services, or providing us with personal information, you agree to the practices described in this Privacy Statement.

**1. Information We Collect**

We may collect the following types of personal information from you:

* **Personal Identification Information:** Name, address, email address, phone number, date of birth, social security number, and other identification information.
* **Financial Information:** Bank account details, investment preferences, income information, and financial history necessary for the services we provide.
* **Transactional Information:** Information about your interactions with our services, including purchases, subscriptions, or any financial advice or transactions you conduct with us.

We collect this information through forms, communications with our team, online activities, and from third-party sources as permitted by law.

**2. How We Use Your Information**

We use the information we collect for the following purposes:

* **To Provide Services:** To offer personalized financial education, advice, and services, including planning, investment guidance, and resource materials.
* **To Communicate with You:** To respond to inquiries, provide customer support, send newsletters, updates, and other information related to our services, or fulfill any other requests you may make.
* **To Improve Our Services:** To analyze trends, monitor usage patterns, and improve our website, services, and content.
* **Compliance and Legal Requirements:** To comply with applicable legal and regulatory obligations, such as anti-money laundering (AML) requirements or reporting obligations.

We will only use your personal data for purposes consistent with the reasons for which it was collected or as otherwise required or permitted by law.

**3. Sharing Your Information**

We do not sell, trade, or rent your personal information to third parties. However, we may share your information in the following circumstances:

* **Service Providers:** We may share your personal information with trusted third-party service providers who assist us in operating our business, such as cloud storage, email delivery, or customer support.
* **Legal Compliance:** We may disclose your information to government authorities or other third parties when required to do so by law or to protect our rights, safety, or property.
* **Business Transfers:** In the event of a merger, acquisition, or sale of assets, your personal information may be transferred as part of that transaction. We will notify you in advance if this occurs.

We require any third-party service providers to adhere to strict privacy standards and protect your personal data. This includes Morningstar (our chosen vendor for analytics and optional portfolio monitoring) and Envestnet MoneyGuide (vendor for our planning software)

**4. Data Security**

We take reasonable measures to safeguard your personal information from unauthorized access, alteration, disclosure, or destruction. These measures include encryption, access control, and secure data storage.

However, no method of transmission over the internet or method of electronic storage is completely secure. While we strive to protect your personal data, we cannot guarantee its absolute security.

**5. Your Rights and Choices**

You have the following rights regarding your personal information:

* **Access and Correction:** You may request access to the personal information we hold about you and request corrections if the information is inaccurate or incomplete.
* **Data Deletion:** In some circumstances, you may request that we delete your personal data. However, certain information may need to be retained for legal or business purposes.
* **Opt-Out of Communications:** You can unsubscribe from marketing communications at any time by clicking the unsubscribe link in any of our emails or by contacting us directly.
* **Data Portability:** You may request to receive a copy of your data in a structured, commonly used, and machine-readable format.

To exercise any of these rights, please contact us using the information provided at the end of this statement.

**6. Cookies and Tracking Technologies**

We may use cookies and similar tracking technologies to collect information about your use of our website. Cookies help us improve your browsing experience, personalize content, and analyze website traffic.

You can control cookie settings through your browser settings, but please note that disabling cookies may affect your experience on our website.

**7. Children's Privacy**

We do not knowingly collect personal information from children, unless that information is relevant to the guardian’s financial plan. If we become aware that we have collected unnecessary personal information from a child, we will take steps to delete that information.

**8. Updates to This Privacy Statement**

We may update this Privacy Statement from time to time to reflect changes in our practices, services, or applicable laws. We will notify you of any significant changes by posting an updated version on our website and revising the “Effective Date” at the top of this page.

We encourage you to review this Privacy Statement periodically to stay informed about how we are protecting your information.

**9. Contact Us**

If you have any questions or concerns about this Privacy Statement or how we handle your personal information, please contact us:

**Seaport Financial Education LLC**  
138 Heritage Drive  
Portsmouth, RI 02871  
Phone: 401-595-5511  
Email: [wdwyer@SeaportFinEd.com](mailto:wdwyer@SeaportFinEd.com)

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