Our Commitment to Privacy

Investment Planners, Inc. and IPI Wealth Management, Inc. have always been committed to maintaining the confidentiality, integrity, and security of personal information entrusted to us by current and prospective clients. We are proud of our privacy practices, and we want you to know how we protect your information.

Investment Planners Inc. & IPI Wealth Management, Inc. Privacy Statement

How, What and Why We Obtain Personal Information

At Investment Planners, Inc. and IPI Wealth Management, Inc., we use personal information collected about you to provide you with the superior service you have come to expect from us. Unless directed by Federal law, we may use this information to develop, offer and deliver products and services; process transactions in your account; respond to inquiries from you or your representative; or to fulfill legal and regulatory requirements. Investment Planners, Inc. and IPI Wealth Management, Inc. may collect from areas that would include:

- Information provided on applications or forms (examples include name, address, Social Security number, birthdate, assets, and income)
- Transactional activity in your account (examples include trading history, payment history and account balances)
- Information provided by you or your representative regarding your preferences (such as paper statements vs. electronic statements, or the screen layout you specify if you use our Internet site)
- Other sources with your consent or with the consent of your representative (for example, from other institutions if you transfer positions)

How We Protect Your Information

The affiliation of Investment Planners, Inc. and IPI Wealth Management, Inc. have always considered the protection of sensitive information to be a sound business practice and a foundation of client trust.

Investment Planners, Inc. and IPI Wealth Management, Inc. will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic, and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information.

Within Investment Planners, Inc., IPI Wealth Management, Inc. and among our service providers, we restrict access to information to those who require it to provide products and services to you. We may share the personal information that we collect with the following entities:

- Government regulatory agencies and law enforcement officials (for example, for tax reporting or under court order)
- Other organizations to provide additional service of your account as permitted by law and regulated by you.
- Custodial and clearing firms where accounts are held.

To limit IPI and IPI Wealth Management, Inc.'s sharing:

- Call (217) 425-6340 –*Our menu will prompt you through your choice(s)*
- Visit us online: https://www.investment-planners.com/
- Send us in writing whether you wish to limit our sharing at any time.

Please Note:
If you are a new customer, we can begin sharing your information immediately from the date you receive 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.

Our Primary Client Goal is to Protect Your Privacy