



MPM Wealth Advisors

Privacy Notice

FACTS	WHAT DOES MPM WEALTH ADVISORS 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. <i>Please read this notice carefully to understand what we do.</i>		
What?	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 • Address and contact information • Driver's license number • Marital status • Assets and income • Risk tolerance • Ownership of property • Transaction history • Health information When you are no longer our customer, we continue to share information about you as described in this notice.		
How?	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 customers' personal information; the reasons MPM chooses to share; and whether you can limit this sharing.		
REASONS WE CAN SHARE YOUR PERSONAL INFORMATION		DOES MPM SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes - such as to process your transactions, maintain your accounts(s) or respond to court orders and legal investigations.		Yes	No
For our marketing purposes - to offer our products and services to you		Yes	No
For joint marketing with other financial companies		No	No
For our affiliates' everyday business purposes - information about your transactions, experiences and creditworthiness		No	We don't share
For our affiliates to market to you* <i>* In California, customers have the right to opt-out of sharing personal information with affiliates.</i>		No	We don't share
For nonaffiliates to market to you		No	We don't share
QUESTIONS?	7429 International Drive, Suite A Holland, OH 43528 Telephone: 800-814-1706 Fax: 419-861-1450 www.mpmwealth.com		
WHAT WE DO			
How does MPM protect my personal information?		To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.	

How does MPM collect my personal information?	We collect your personal information, for example, when you: • enter an investment advisory contract, • seek financial advice, • make deposits or withdrawals from your account, • tell us about your investment or retirement portfolio, and • give us your employment history. We also collect your personal information from others, such as credit bureaus, affiliates or other companies.
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, and • sharing with 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>MPM has no affiliates.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <i>MPM 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>MPM does not jointly market.</i>