



COPPER LEAF FINANCIAL, LLC PRIVACY POLICY

Copper Leaf Financial, LLC (Copper Leaf) is committed to client confidentiality and the protection of your privacy. The following information is provided, as required by Federal law, to help you understand our privacy policy and how we will handle and maintain non-public personal information. We highly recommend that you read this notice carefully to understand what we do.

The types of non-public personal information we collect and share depend on the services you have with us. This information can include items such as your Social Security number and income, your account balances and transaction history, and your investment experience and account transactions. We collect your non-public personal information in a variety of ways. For example, we obtain your non-public personal information when you open an account or give us your income information, tell us about your portfolio or deposit money, or enter into an investment advisory contract. We also collect your non-public personal information from other companies, for example, custodians who hold your account assets.

All financial companies need to share customer's non-public personal information to run their everyday business. Below we describe the reason we can share your non-public personal information and whether you can limit this sharing.

We share your non-public personal information for our everyday business purposes such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, report to credit bureaus, to protect the confidentiality or security of your records, or as permitted by law. We may also share your non-public personal information for our own firm's marketing purposes; so that we can offer our products and services to you.

Federal law gives you the right to limit only sharing non-public information about your creditworthiness for our affiliates' everyday business purposes; sharing non-public personal information about you with our affiliates to market to you; and sharing non-public information with non-affiliates to market to you.

Copper Leaf Financial will not disclose personal information about current or former clients to non-affiliated third parties except as required by law. Copper Leaf Financial does not sell any personal information about you to any third party. Copper Leaf Financial will not disclose personal information without your authorization, except as required by law.

Copper Leaf Financial will update its policy and procedures when necessary to ensure that your privacy is maintained and that Copper leaf conducts business in a way that fulfills our commitment to you. If Copper Leaf Financial makes any material changes to its privacy policy, we will make that information available to clients through our Web site and/or other communications.

Inquiries regarding this policy should be directed to our office by calling 802-878-2731 or via email at info@copperleaffinancial.com.

For additional information please, please see the Copper Leaf Financial Disclosure Brochure - Form ADV at <https://copperleaffinancial.com/FormADV.pdf>.