



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 law, to help you understand our privacy policy and how we will handle and maintain confidential personal information as we fulfill our obligations to protect your privacy. "Personal information" refers to the nonpublic financial information obtained by Copper Leaf in connection with carrying out our services.

Information We Collect

Copper Leaf collects personal information as part of our relationship to you, to provide client services and fulfill legal and regulatory requirements. The type of information Copper Leaf collects may include:

- σ Information Copper Leaf receives from you on forms (such as name, address, Social Security number, profile documents, assets and income);
- σ Information you provide Copper Leaf directly about your personal finances or personal circumstances or which Copper Leaf may receive from brokerage statements or other information you authorize Copper Leaf to receive.

Information Disclosed In Administering Products and Services

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

To limit our sharing of information, please contact Copper Leaf at 802-878-2731 or via email at info@copperleaffinancial.com.

Procedures to Protect Confidentiality and Security of Your Personal Information

Copper Leaf has procedures in place that limit access to personal information to those employees who need to know such information in order to perform business services. In addition, Copper Leaf maintains physical, electronic and procedural safeguards to guard your nonpublic personal information. We update and test our security technology on an ongoing basis. We review access rights throughout the year to ensure your personal data is only accessible to those employees who need to know that information to provide benefits or services to you. In addition, we train our employees about the importance of confidentiality and maintaining the privacy and security of your information. We commit to taking appropriate disciplinary measures to enforce our employees' privacy responsibilities.

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://adviserinfo.sec.gov/firm/summary/285378>