Client Privacy Policy

Background

Mindful Details LLC DBA Mindful Money Management ("Mindful Money Management") provides daily money management services and consulting services in the areas of financial organization, providing clarity about finances, and financial decision support, as well as related consulting services. Mindful Money Management respects the privacy of its clients ("Clients") and the personal information they share with Mindful Money Management ("Personal Information").

This Client Privacy Policy covers Mindful Money Management's privacy practices regarding Sensitive Client Information received from Clients or that Mindful Money Management otherwise receives, collects, uses, discloses, and disposes of in performing Services for Clients.

Client Information Collected by Mindful Money Management

Mindful Money Management collects information from Clients in a number of ways. First, Clients may provide information to Mindful Money Management directly in person, by mail, by phone, by email, or by other electronic communications. Some of that information is Sensitive Client Information concerning their finances.

Second, Mindful Money Management may obtain Sensitive Client Information from third parties. For instance, if Mindful Money Management is reviewing bank account statements, it will have access to Sensitive Client Information generated by the bank. Mindful Money Management may also have access to Sensitive Client Information online accounts, computers, mobile devices, and storage media.

Third, Mindful Money Management may generate Sensitive Client Information in performing Services for Clients. For example, if Mindful Money Management generates reports to summarize the state of a Client's finances, the reports would be Sensitive Information.

For information about Mindful Money Management's collection of information via its website and its website privacy practices, see the current version of the Mindful Money Management Website Privacy Statement.

Contact at Mindful Money Management

This document is the Client Privacy Policy of Mindful Details LLC DBA Mindful Money Management. The contact person to answer questions concerning this Client Privacy Policy is:

Kathy Uros
Mindful Money Management

63 Bovet Rd. #333
San Mateo, CA 94402-3104
650.339.2138
kathy@managemoneymindfully.com

How Mindful Money Management Use Sensitive Client Information

Mindful Money Management uses Sensitive Information about Clients for the following purposes:

- To deliver services to the Clients.
- To respond to direct communications and inquiries concerning Mindful Money Management's services.
- To contact individuals providing for the purposes of providing updates and marketing information about Mindful Money Management's services.

How Mindful Money Management Safeguards Collected Information

Mindful Money Management's is committed to maintaining the confidentiality, integrity, and availability of Sensitive Client Information. More particularly, Mindful Money Management is committed to maintaining reasonable and appropriate administrative, physical, and technical safeguards to:

- Provide assurances of the integrity and confidentiality of Sensitive Client Information;
- Protect against reasonably anticipated -
  - Threats or hazards to the security or integrity of Sensitive Client Information, and
  - Unauthorized uses or disclosures of Sensitive Client Information; and
- Ensure compliance with the Mindful Money Management Client Security Policy by the officers, members, and workforce of Mindful Money Management.

For more details, please refer to the current version of the Mindful Money Management Client Data Security Statement.

Sharing and Disclosure of Client Information

Mindful Money Management does not share Clients' Sensitive Information with, or disclose it to, any third parties, except:

- In connection with providing Services to you, for example if you instruct us to contact one of your financial services providers,
- If you specifically authorize the disclosure of Sensitive Information, for example if you ask for us to provide Sensitive Information to your financial planner,
- If Mindful Money Management is required to make disclosures under law or pursuant to judicial or administrative process, or

- In connection with a sale of all or substantially all the assets of Mindful Money Management.

Accessing and Changing Client Information

You can access, correct, or update the Client Information about you that Mindful Money Management has stored. To access the Client Information, please contact the person listed as Mindful Money Management's contact above. The contact person will provide you with any records sufficient to show the Client Information Mindful Money Management has collected about you, if any, and how you can remove, change, or update it.

Mindful Money Management reserves the right to amend this Client Privacy Policy from time to time. Mindful Money Management will provide you with an updated copy from time to time. Continued use of Mindful Money Management's services constitutes your continued assent to the Client Privacy Policy as amended at that time.

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Thank you for taking the time to review this Client Privacy Policy, which summarizes Mindful Money Management's Sensitive Client Information privacy practices.