



PRIVACY NOTICE

As a trusted adviser, Diversified Portfolios, Inc., has always taken care to protect the confidentiality of information from and about you that we receive when we provide services to you. This confidentiality is an essential foundation of our relationship with you. Our Privacy Policy appears below. Please look it over and call us if you have any questions. Make sure you keep a copy of this policy with your other important papers.

PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information from you to assist us in providing financial planning and investment management services to you. The categories of nonpublic personal information we collect depends upon the types of services we provide for you. We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications or other forms, such as your name, address, social security number, date of birth, telephone number, assets, income, employment information and insurance beneficiaries.
- Information about your transactions with us or others, such as your account balance, parties to transactions, account usage, and payment history.
- Information developed as part of the financial planning process or investment advisory services.

"Nonpublic personal information" is nonpublic information about you that we obtain in connection with providing a financial service to you for personal, family or household purposes. It does not include information available from government records, widely distributed media, or government mandated disclosures.

THIRD PARTIES WITH WHOM WE MAY SHARE INFORMATION

We do not disclose nonpublic personal information about our customers or former customers to anyone except as permitted by law. For example, we are permitted by law to share information about you with:

- Companies that assist us in servicing your account such as your custodian, for purposes of opening and maintaining your investment account.
- A brokerage firm in order to execute securities transactions on your behalf.
- Third parties to whom you authorize us to disclose your personal information in connection with services we provide to you, including if our Wealth Advisor leaves us, retires, or moves to a new firm, we may disclose your personal information to the new firm.
- Service providers such as software companies, our attorneys, our accountants, other consultants who, in the ordinary course of providing their services to us, may require access to nonpublic personal information.
- Federal and state regulators that regulate our firm and representatives.

We do not provide your personally identifiable information to direct marketers or solicitors for any purpose.

DISCLOSURE OF INFORMATION ABOUT FORMER CUSTOMERS

We will continue to adhere to the privacy practices described in this notice when you become a former customer. You become a former customer when you close all your accounts with us or your investment advisory contract is terminated.

We will maintain personally identifiable information about you during the time you are a customer, and for any time thereafter that we are required to maintain such records by federal and state securities laws, and the CFP Board Code of Ethics and Professional Responsibility. After this required period of record retention, we will destroy that information.

OUR SECURITY POLICIES AND PRACTICES

We restrict access to nonpublic personal information about you to those employees who need the information to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards and the standards of our profession to guard your nonpublic personal information.

All employees are trained and required to safeguard this information. We continue to evaluate our efforts to protect nonpublic personal information.

We reserve the right to change our privacy policies or procedures, at any time without prior notice. However, if we make any substantial changes in the way we use or disseminate your nonpublic personal information, we will notify you if you remain an active customer of Diversified Portfolios, Inc.

HOW TO CONTACT US

If you have any questions or comments about our Privacy Policy or practices, please contact us at:

Diversified Portfolios, Inc.
39520 Woodward Ave., Ste. 200
Bloomfield Hills, MI 48304
Attention: Chief Compliance Officer
T: 248.644.3030

This Privacy Policy was last updated May 6, 2024.