MILESTONES
FINANCIAL PLANNING, LLC

Johanna Fox Turner, CPA, CFP®, RLP® Principal

Disclosures

Milestones Financial Planning, LLC ("MFP") is an Investment Advisor firm registered in the state of Kentucky. Based in Mayfield, Kentucky, MFP is owned and operated by Johanna Fox Turner, CPA, CFP®, RLP® and serves a diverse client base. Milestones Financial Planning provides independent fee-only life and financial planning services, along with investment advisory services.

As a Fee-Only financial planning firm, MFP seeks to coordinate support among clients' tax, legal, insurance, and real estate advisors. MFP also offers tax, retirement, education, and estate planning services.

Privacy Policy

A primary client goal of Milestones Financial Planning, LLC is to protect your privacy. To conduct regular business, we may collect nonpublic personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information about your transactions with us or others

MFP shares nonpublic information solely to service our client accounts. We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as required or permitted by law.

To serve our clients, we may disclose the information below regarding customers and/or former customers, as necessary, to companies and financial institutions to perform certain services on our behalf, with our clients' permission and/or as required by law.

- Information MFP receives from clients on applications (name, social security number, address, assets, etc.)
- Information about client transactions with MFP or others (account information, payment history, etc.)
- Information regarding other assets & liabilities, insurance policies, and legal documents.

At times, we may disclose nonpublic personal information to affiliated third parties. We may share any of the information that we collect as described above. With your permission, we may disclose nonpublic personal information about you to the following types of affiliated third parties:

- Financial service providers such as mortgage brokers, insurance companies, or broker dealers
- Insurance agents, financial planning support resources, accountants, attorneys and other professionals based on the work that our clients have asked us to perform, or that we believe is needed as part of our relationship with our clients.

Information Safeguarding

Milestones Financial Planning, LLC will internally safeguard your nonpublic personal information by restricting access to only those employees who provide services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic, and procedural safeguards that meet federal and/or state standards to guard your nonpublic personal information. These safeguards include file shredding, secure offsite backup, passwords, and encrypted websites, as well as physically securing our office files and client information.