

Encore Legacy Planning

Website Privacy Policy

Last Updated: July 16, 2026 | Effective Date: July 16, 2026

Encore Legacy Planning (“Encore,” “we,” “us,” or “our”) respects your privacy. This Privacy Policy explains how we collect, use, disclose, and protect personal information when you visit www.encorelegacyplanning.com (the “Site”) or engage us for insurance, estate, or legacy planning services. By using the Site or our services, you agree to the practices described in this Policy.

1. Who We Are and How to Reach Us

Encore Legacy Planning

5300 Triangle Pkwy., Ste. 201, Peachtree Corners, GA 30092

Website: www.encorelegacyplanning.com

Privacy Contact: brett@elp.guide

2. Information We Collect

2.1 Information You Provide Through the Site

When you fill out a contact or scheduling form, sign up for updates, or otherwise reach out through the Site, we may collect:

- Name, email address, and phone number
- Any message, question, or information you choose to include

2.2 Information Collected When You Engage Our Services

If you become a client and work with us on insurance, estate, or legacy planning matters, we (or the carriers and custodians we work with) collect more detailed personal information necessary to provide those services, which may include:

- Government-issued identifiers, such as your Social Security number or date of birth
- Financial account information, income, assets, and other financial details
- Beneficiary, family, and estate-planning information
- Health information relevant to insurance underwriting or long-term care planning

[This information is typically collected through applications, consultations, or a secure client portal — not through public Site pages — but it's included here because it's personal information we process about you]

We only collect this sensitive information as needed to prepare applications, quotes, or plans on your behalf, or as required by the insurance carriers and financial institutions we work with.

2.3 Information Collected Automatically

Like most websites, the Site may automatically collect limited technical information when you visit, such as your IP address, browser type, device information, and the pages you view. This may be gathered through standard web server logs and analytics tools, such as Google Analytics, which may use cookies to collect information about your visit.

3. How We Use Your Information

We use the information described above to:

- Respond to inquiries and schedule consultations
- Prepare insurance applications, quotes, and financial or estate plans
- Communicate with the insurance carriers, custodians, and financial institutions involved in your plan
- Maintain client records as required by insurance and financial regulations
- Improve and maintain the Site
- Comply with legal, regulatory, and licensing obligations

We do not sell your personal information.

4. How We Share Your Information

We share personal information only as necessary to provide our services and operate our business:

- Insurance carriers, underwriters, custodians, and financial institutions involved in your application or plan
- Service providers who support our business operations (e.g., IT, hosting, scheduling, or communications tools), under confidentiality obligations
- Regulators, licensing authorities, or others as required by law or to defend our legal rights
- A successor entity in the event of a merger, acquisition, or sale of the business, with notice to you where required

We do not share your information with third parties for their own marketing purposes.

[Important: because Encore collects nonpublic personal financial information in connection with insurance products, the Gramm-Leach-Bliley Act (GLBA) and most state insurance privacy regulations require a separate annual privacy notice to customers, with specific content and delivery requirements, distinct from this website policy. Recommend confirming your GLBA/state notice obligations with an insurance compliance attorney or your carrier compliance team — this document does not replace that notice.]

5. Data Security

We use reasonable administrative, technical, and physical safeguards designed to protect personal information from unauthorized access, use, or disclosure, consistent with the sensitivity of the information and applicable insurance and financial privacy regulations. No method of transmission or storage is completely secure, and we cannot guarantee absolute security.

6. Data Retention

We retain personal information for as long as needed to provide our services and to satisfy legal, regulatory, and recordkeeping requirements applicable to insurance and financial planning professionals, after which it is securely deleted or archived in accordance with applicable law.

7. Your Privacy Rights

Depending on your state of residence, you may have rights regarding your personal information, including the right to know what information we collect, to request access or correction, or to request deletion (subject to our recordkeeping obligations as a licensed insurance and financial services provider).

California Residents (CCPA/CPRA)

If you are a California resident, you have the right to request disclosure of the categories of personal information we collect and the purposes for which it is used, to request deletion (subject to legal exceptions), and to be free from discrimination for exercising these rights. We do not sell or share personal information for cross-context behavioral advertising.

To exercise any of these rights, contact us at brett@elp.guide.

8. Cookies and Tracking Technologies

The Site may use cookies or similar technologies to support basic functionality and, if enabled, analytics. You can control cookies through your browser settings; disabling them may affect some Site functionality.

9. Children's Privacy

The Site and our services are not directed to individuals under the age of 18, and we do not knowingly collect personal information from children.

10. Links to Other Websites

The Site may contain links to third-party websites, including insurance carriers and financial institutions. We are not responsible for the privacy practices of those third-party sites, and we encourage you to review their privacy policies.

11. Changes to This Policy

We may update this Policy from time to time. Any changes will be posted on this page with an updated “Last Updated” date. We encourage you to review this Policy periodically.

12. Contact Us

If you have questions about this Policy or how we handle your personal information, please contact us at brett@elp.guide.

This document is a draft prepared for Encore Legacy Planning based on a general template and the information provided. It has not been reviewed by an attorney. Given that Encore handles insurance and financial data, we recommend having a licensed attorney (and, separately, confirming GLBA/state insurance privacy notice requirements) review this before publishing.