

Effective Date: 10/20/25

At The Glenn Planning Group (“we,” “us,” or “our”), we are committed to protecting your privacy. This Privacy Policy explains how we collect, use, disclose, and protect your personal information when you visit our website, www.theglennplanninggroup.com (“Site”) or communicate with us through it.

1. Information We Collect

We may collect the following types of personal and non-personal information:

a. Personal Information

Collected when you:

- Fill out our ‘Learn More’ form
- Contact us by phone or email
- Subscribe to updates or request services

Examples include:

- Full name
- Phone number
- Email address
- Mailing address
- Financial or service-related details (if submitted)

b. Non-Personal Information

Automatically collected via cookies and analytics tools:

- IP address
- Browser type and version
- Pages visited
- Time spent on the Site
- Device type

2. How We Use Your Information

We use the information we collect to:

- Schedule and manage inquiries or consultations
- Respond to your requests
- Deliver financial planning and advisory services
- Improve our website and client experience
- Ensure security and legal compliance

3. How We Share Your Information

We do not sell or rent your personal information. We may share it only in the following cases:

- With service providers that support our operations (e.g., IT or email platforms), under confidentiality agreements
- With your permission, to coordinate with legal, tax, or financial advisors
- As required by law or legal process


4. Your Privacy Rights

You may have rights under applicable law to:

- Access the personal data we hold about you
- Request corrections
- Ask for deletion of your data
- Opt out of non-essential communications

To make a request, contact us at:

 tara@glennplanning.com

 904.529.5121

5. Cookies and Tracking

Our Site may use cookies and other tracking tools to:

- Analyze site traffic
- Improve usability and performance
- Customize your experience

You can control cookie preferences in your browser settings.

6. Data Security

We use physical, technical, and administrative safeguards to help protect your personal information. While no method is completely secure, we strive to use commercially acceptable means to protect your data.

7. Third-Party Links

Our Site may link to external websites. We are not responsible for the privacy practices of other websites.

8. Children's Privacy

Our Site and services are not directed toward children under the age of 13. We do not knowingly collect information from minors.


9. Changes to This Privacy Policy

We may revise this policy from time to time. Updated versions will be posted on this page with the revised Effective Date.

10. Contact Us


If you have questions about this Privacy Policy or how we handle your information, please contact us:

The Glenn Planning Group, Inc.

 1500 Seton Place

Fleming Island, FL 32003

 tara@glennplanning.com

 904.529.5121