



Sensible Social Security

Privacy Policy

Sensible Social Security (“we,” “our,” or “us”) is committed to protecting the privacy and personal information of our clients and website visitors. This Privacy Policy explains how we collect, use, and share your personal information when you engage our services or visit our website.

Information We Collect

We may collect the following types of personal information:

- **Contact Information:** Name, email address, phone number, and mailing address.
- **Demographic Information:** Date of birth, gender, and marital status.
- **Financial and Planning Information:** Social Security benefit statements, income data, retirement assets, life expectancy estimates, and other data you provide to assist with your Social Security claiming strategy.
- **Communication Preferences:** Your consent to receive emails, calls, or SMS/text messages from us.

How We Use Your Information

We use your personal information to:

- Provide customized Social Security claiming strategies.
- Communicate with you about your plan, consultations, and appointments.
- Send relevant updates, reminders, and service-related information via email, phone, or SMS (with your consent).
- Improve the quality of our services and client experience.
- Comply with legal or regulatory requirements.

Information Sharing

We do **not** sell or rent your personal information to third parties. We may share your information only in the following limited circumstances:

- **Service Providers:** We may share information with third-party vendors who assist us in delivering services (e.g., secure data storage, CRM software). These providers are required to maintain confidentiality and use information only to support our operations.
- **Legal Requirements:** We may disclose information if required to comply with applicable laws, regulations, legal processes, or governmental requests.

SMS Communication and Consent

If you opt in to receive SMS/text messages from us, your consent will be used solely for communication purposes related to our services.

SMS consent is not shared with third parties or affiliates for marketing purposes.

You may opt out of SMS communications at any time by replying “STOP” or contacting us directly.