

# Privacy Policy

This Privacy Policy details how Gateway Financial & Estate Planning Inc (the “Company”) utilizes and protects information and data that you share with Company when accessing this website. Company commits to ensure that your privacy is protected. All information that is asked to be provided when using this website will assuredly only be used in accordance with this privacy statement. Company may change this policy from time to time by updating this page. You should check this page from time to time to ensure that you are aware of any changes that may have occurred. This policy is effective January 1, 2026.

The following information may be collected:

- Name and Job Title.
- Contact information, including email address.
- Demographic information such as postcode, preferences and interests.
- Other information relevant to customer surveys and offers.

This information is required to better understand your needs and provide you with appropriate service. The information is used for the following purposes:

- Internal recording keeping.
- Information may be used to improve products and services.
- May send periodic email regarding new products, special offers, or other information that we find relevant to you. Those emails will be sent to the email address you have provided.
- Market research.
- Tailor website your particular interests.
- Provide information to third party partners for marketing or promotional purposes.
- We will never sell your information.

## Security

We are committed to ensuring that your information is secure. In order to prevent unauthorized access or disclosure suitable physical, electronic and managerial procedures have been implemented to safeguard and secure the information collected online.

## Cookies

A cookie is a small file which asks permission to be placed on your computer’s hard drive. Once you agree, the file is added and the cookie helps analyze web traffic and informs you when you visit a particular site. Cookies allow web applications to respond to you as an individual. The web application can tailor its operations to your needs, likes, and dislikes, by gathering and remembering information about your preferences.

We use traffic log cookies to identify which pages are being used. This helps us analyze data about web page traffic and improve our website in order to tailor it to customer needs. This information is used solely for statistical analysis purposes and then the data is removed from the system.

Cookies help provide the user with a better website experience, by allowing us to monitor which pages are most useful and which ones are not. A cookie in no way gives us access to your computer or any information about you, other than the data you choose to share with us.

You can choose to accept or decline. Most web browsers automatically accept cookies, but you can usually modify your browser setting to decline cookies if you prefer. This may prevent you from taking full advantage of the website.

## Links to Other Websites

Our website may contain links to enable you to visit other websites on the internet. If you choose to access one of these other websites via a link, we do not have any control over the other website or how they use your information. Therefore, we are not responsible for the protection and privacy of any information you provide while visiting such sites and such sites are not governed by this privacy statement. You should exercise caution and look at the privacy statement applicable to the website in question.

## Controlling Your Personal Information

You may choose to restrict the collection or use of your personal information in the following ways:

1. When you are asked to fill in a form on the website, check the box that indicates that you do not consent to your information to be used for direct marketing purposes.
2. Or, if you have already consented to the use of your information, but would like to revoke or change that consent, you may contact us via email at the email address listed below or by mail at the address listed below.

We will not sell, distribute, or lease your personal information to third parties unless we have your permission or are required by law. We may use your personal information to send you promotional information about third parties which may be deemed relevant to you if you indicate your consent to this sort of communication.

No mobile information will be shared with third parties/affiliates for marketing/promotional purposes. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.

You may request details of personal information which we hold about you under the Data Protection Act. A small fee will be charged. If you would like a copy of the information, please email us or send us a letter indicating your desire to obtain a copy of your information.

If you believe that any information that is being stored by us is incorrect or incomplete, please write to or email us as soon as possible, at the address below. We will promptly correct any information found to be incorrect.

Contact us at: [assistant@gatewayfp.net](mailto:assistant@gatewayfp.net) | 2901 Bluegrass Blvd. Suite 200 Lehi UT 84048