

Creative Planning, Inc.

Privacy Policy

Effective Date: March 31, 2016

Privacy Policy

Creative Planning, Inc. (“we,” “us,” or “our”) values the privacy of its users and clients who use www.portfoliocheckup.com and its associated services (the “Website”). This privacy policy describes how we may collect, use, and in some instances share the information you provide to us or that we learn from your use of the Website (“Privacy Policy”).

Information We Collect

When you register on the Website, you provide us with nonpublic personal information about you, such as name, email address, age, postal mailing address, home/mobile telephone number, fax number, financial information and billing information, personal investment preferences, and financial profiles and parameters (“NPI”).

When you visit the Website, we gather certain information about you automatically and store it through the use of technology, such as cookies. For example, our servers may automatically collect information from your web browser such as your IP address, web browser type, the pages or sites that you visit just before or just after the Website, the pages you view on the Website, and the dates and times that you visit. We can link these cookies to your information, including NPI, and “remember” what you have done on the Website before and personalize our Website for you.

How We Use Information We Collect

We use your information to provide to you all of the features and services found on the Website. We may use your email address, without further consent, to market and promote our services to you and for non-marketing or administrative purposes such as notifying you of major Website updates. We may also use your email address to send materials that you request (e.g. newsletters and RSS feeds). We may also use the information that you provide to us or that we automatically collect from you to understand usage trends and preferences, to improve the way the Website works and looks, to improve our marketing and promotional efforts, and to create new features and functionality.

Information We Disclose

We may disclose both NPI and other automatically collected information to both affiliated and non-affiliated businesses and persons to provide you all of the features and services on the Website, to process such information on our behalf, in furtherance of the services we provide to you as our client, as reasonably necessary to provide website hosting, maintenance and security, to offer certain features on the Website (such as customer support), to assist us in improving the way the Website works and looks, and to create new features. These companies are authorized to use your NPI only as necessary to provide these services to us.

Unless we have your consent, we do not share your NPI with our affiliates so that they can offer their products and services directly to you.

We do not sell, rent, or otherwise share your information with any third parties except as permitted or required by law, such as when we reasonably believe it is necessary or appropriate to investigate, prevent, or take action regarding illegal activities, suspected fraud, frontrunning, or violations of our Terms of Use.

We may share automatically collected and other aggregate non-identifiable information with interested third parties to assist them in understanding the usage patterns for certain content, services, advertisements, promotions, and/or functionality on the Website.

Information Obtained From Third Parties

If you provide us personal information about others, or if others give us your information (such as name, date of birth and gender), we will only use that information for the specific reason for which it was provided to us.

Security of Information

No data transmissions over the Internet can be guaranteed to be 100% secure. Consequently, we cannot ensure or warrant the security of any information you transmit to us and you do so at your own risk. Once we receive your transmission of information, we maintain physical, electronic and procedural safeguards that comply with applicable federal standards to guard your NPI.

However, please note that this is not a guarantee that such information may not be accessed, disclosed, altered, or destroyed by breach of any of our physical, technical, or managerial safeguards.

Changes to NPI and User Preferences

You may at any time request a copy of our record of your NPI, change your NPI or user preferences, and stop receiving our newsletter by contacting us at cpi@thinkingbeyond.com.

We will retain your information for as long as your account is active or as needed to provide you services. We will retain and use your information as necessary to comply with our legal obligations, resolve disputes, and enforce our agreements.

Third-party Websites and Advertisements

The Website may provide links to third-party websites or advertisements. We do not provide your NPI to third parties without your consent or except as part of a specific program or feature for which you will have the ability to opt-out. You should consult the respective privacy policies of these third-party websites or advertisements. This Privacy Policy does not apply to, and we cannot control the activities of, such other advertisers or advertised websites.

Our Website may offer publicly accessible blogs or community forums. You should be aware that any information you provide in these areas may be read, collected, and used by others who access them. To request removal of your information from our blog or community forum, contact us at

cpi@thinkingbeyond.com. In some cases, we may not be able to remove your information, in which case we will let you know if we are unable to do so and why.

Changes to this Privacy Policy

Our Privacy Policy may change from time-to-time. If we make material changes to this Privacy Policy, we will provide you with notice on our home page prior to the change becoming effective.

Contact Us

If you have any questions, comments, or concerns about this Privacy Policy, please email us at cpi@thinkingbeyond.com or via physical mail at:

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