

Privacy Policy

Effective date: September 17, 2026

This Privacy Policy describes how Level Ground LLC ("Level Ground," "we," "our," or "us") handles information in connection with our retirement guidance, family financial coordination, and licensed insurance services, and our websites, findlevelground.com and levelgroundinsurance.com.

Information We Collect

Depending on the services you engage us for, this may include your contact information, Social Security number, income and account information as you provide it to us, insurance policy details, family financial information shared in the course of family coordination conversations, information related to ongoing care needs, and information relevant to insurance underwriting, including health information, if you engage us for insurance placement.

We do not independently access your financial accounts; account information reflects what you tell us.

How We Use and Share Information

We use your information to provide the services you've engaged us for, develop your financial analysis and guidance, obtain insurance quotes and process placements, and communicate with you. We occasionally send educational content or a check-in email; every such email includes a clear unsubscribe option.

We do not sell your personal information. We share information with insurance carriers and brokerage partners solely to obtain quotes or process a placement, with our secure client portal provider, and, with your permission, with other professionals we refer you to; we share identifying details only once you've confirmed interest in that referral, not upfront. We never transfer your documents to outside parties directly; you control what's shared through the client portal.

Under Massachusetts law, we may disclose your information where necessary to perform services on your behalf. By signing your engagement letter, which incorporates this policy, you authorize the disclosures described here. Mental health record information specifically may only be released with approval from your treating professional, as required under Massachusetts law.

Our websites may link to outside resources, such as license verification tools. We aren't responsible for the privacy practices of sites we don't control.

Our services are not directed to individuals under 18, and we do not knowingly collect information from minors.



Security

We maintain safeguards designed to protect your information, consistent with our Written Information Security Program, as required under Massachusetts law. No method of storage or transmission is completely secure.

Your Rights

You may request to access, correct, or delete the personal information we hold about you, subject to legal recordkeeping requirements, by contacting us at info@findlevelground.com. We aim to respond within 30 days.

We retain information for as long as necessary to provide our services and meet legal obligations, then it is securely deleted.

Changes to This Policy

We may update this policy from time to time; the current version is always posted at findlevelground.com and levelgroundinsurance.com. A printed copy may not reflect the most current version.

Contact Us

Level Ground LLC

769 Centre St, Suite 216, Boston, MA By appointment only

info@findlevelground.com