

HERITAGE PRIVACY POLICY

Effective Date: May 5, 2026

Heritage Estate Plans, Inc. ("Heritage Estate Plans," "we," "our," or "us") is committed to protecting the privacy of visitors to our website and individuals who communicate with us through our online services. This Privacy Policy explains how we collect, use, disclose, and protect personal information obtained through our website located at [Website URL] and any related online services. By using our website, you consent to the practices described in this Privacy Policy.

When you visit our website, we may collect personal information that you voluntarily provide, such as your name, email address, telephone number, mailing address, and any information you submit through contact forms, appointment requests, or other communications. We may also collect information automatically through your use of the website, including your IP address, browser type, device information, operating system, pages viewed, dates and times of access, referring websites, and other usage data. We may use cookies and similar technologies to improve website functionality, analyze website traffic, remember user preferences, and enhance the overall user experience. You may adjust your browser settings to disable cookies, although doing so may affect certain website features.

We use the information we collect to respond to inquiries, schedule consultations, provide information about our estate planning services, communicate with prospective and existing clients, improve our website and services, maintain website security, comply with legal obligations, and protect our legal rights and business interests. Where permitted by law, we may also use your information to send updates, newsletters, or marketing communications regarding our services. You may opt out of receiving marketing communications at any time by following the unsubscribe instructions provided in such communications or by contacting us directly.

Heritage Estate Plans, Inc. does not sell personal information. However, we may share personal information with trusted third-party service providers who assist us in operating our website, scheduling appointments, managing communications, hosting data, providing information technology support, or performing other business functions on our behalf. These service providers are authorized to use personal information only as necessary to perform services for us. We may also disclose personal information when required by law, court order, subpoena, or other legal process, or when we reasonably believe disclosure is necessary to protect our rights, property, safety, or the rights, property, or safety of others. In the event of a merger, acquisition, reorganization, or sale of assets, personal information may be transferred as part of the transaction.

We retain personal information for as long as reasonably necessary to fulfill the purposes described in this Privacy Policy, provide requested services, comply with legal and regulatory obligations, resolve disputes, enforce our agreements, and maintain business records. We implement reasonable administrative, technical, and physical safeguards designed to protect personal information against unauthorized access, use, disclosure, alteration, or destruction. Nevertheless, no method of electronic transmission or storage is completely secure, and we cannot guarantee absolute security.

Depending on your state of residence, you may have certain privacy rights regarding your personal information, including the right to request access to personal information we maintain about you, request correction of inaccurate information, request deletion of personal information, and obtain information regarding how your personal information is collected, used, and disclosed. California residents may have additional rights under the California Consumer Privacy Act, as amended by the California Privacy Rights Act. To exercise any applicable privacy rights, please contact us using the information provided below.

Our website may contain links to third-party websites or services that are not owned or controlled by Heritage Estate Plans, Inc. We are not responsible for the privacy practices, content, or security of third-party websites, and we encourage users to review the privacy policies of any third-party sites they visit.

Our website is not directed to children under the age of thirteen, and we do not knowingly collect personal information from children. If we learn that we have collected personal information from a child under thirteen without appropriate consent, we will take reasonable steps to delete such information.

Please note that submitting information through our website, contact forms, email communications, or appointment requests does not create an attorney-client relationship and should not be considered confidential or privileged unless and until a formal engagement agreement has been executed. Users should avoid submitting highly sensitive or confidential information through the website unless specifically instructed to do so through secure channels.

We reserve the right to update or modify this Privacy Policy at any time. Any changes will be posted on this page with an updated Effective Date. Your continued use of the website following the posting of any revisions constitutes your acceptance of the revised Privacy Policy.

If you have questions about this Privacy Policy or wish to exercise your privacy rights, please contact Heritage Estate Plans, Inc. at 1175 Shaw Avenue, Suite 104, PMB 354, Clovis, CA 93612, by telephone at 1-559-826-2048, or by email at admin@heritageplans.com.