TACTICAL PLANNER

Tactical Planner Privacy Policy

Status: Approved
Proposed Effective Date: October 19, 2026
Applications: Property Walkthrough, Mortgage Planner
Developer / Brand: Tactical Planner
Legal Operator: Tactical Planner Holdings LLC
Privacy Contact: support@tacticalplanner.com

1. Introduction

This Privacy Policy applies to Tactical Planner applications, websites and related products and services offered by Tactical Planner Holdings LLC ("Tactical Planner," "we," "us," or "our"), including Property Walkthrough and Mortgage Planner. It describes information handling across our products. Only the practices relevant to the product and features you use apply; a feature described here is not a promise that every product includes it. Any product-specific privacy notice supplements this policy and explains differences before you use the affected feature.

2. Information You Enter or Create

Depending on the product and features you use, information may include property names and addresses; room observations, condition ratings, repair notes and tasks; client names, business names, telephone numbers, email addresses and client-property associations; photographs, videos, audio, LiDAR scans and spatial models; mortgage scenarios, balances, rates, income, debts, purchase funds, reserves, affordability and refinance assumptions; utility providers, service addresses, billing dates, charges, usage and optional bill images or PDFs; and application preferences, version and purchase entitlements. Only enter information you are authorized to use. Bill images and other documents may contain account numbers or other sensitive information; omit information that is not needed.

3. Storage and Processing

Our current Property Walkthrough and Mortgage Planner applications use local-first storage for core property and client records. Creating or saving these records does not by itself send Tactical Planner a copy. Mortgage Planner performs bill text recognition on the device; users review extracted fields and choose whether to retain the original bill. Unretained source documents and unconfirmed recognition text are not part of the saved bill record. Device backups and user-directed exports may create copies elsewhere. Website calculator inputs are processed in the browser. Storage and transfer behavior can differ by product; any hosted accounts, cloud synchronization or server processing will be described in the relevant product notice before that feature is used.

4. Device Permissions

Depending on the feature, an application may request camera access for photographs, video or bill scanning; microphone access for recordings; selected photos or files for imports; supported sensors for LiDAR; location for a requested current-address or map lookup; and contact selection or saving through system contact interfaces. Imported contact fields become part of the client record you choose to save. Saving a contact may also place it in an address book synchronized by your contact provider. Permissions can be managed in device settings. Denying a permission may disable the associated feature without disabling unrelated features.

5. Face ID, Touch ID, and Application Security

Supported Tactical Planner applications offer optional application locking using supported Apple device authentication features. When users enable App Lock, the application uses Apple's native authentication framework to request Face ID, Touch ID, or device authentication, as supported and controlled by the operating system. Tactical Planner does not receive, store, or maintain facial recognition images, fingerprint templates, or device passcodes. Application locking is optional and configured separately on each device. App Lock is designed to restrict access through the application's interface. It does not independently encrypt exported reports, backups, or files shared outside the application.

6. Reports, Backups, and Data Sharing

Supported Tactical Planner applications allow users to create reports and, where supported, export application records and backup files. When users export or share information, they control the destination, which may include: • Files stored on their device. • iCloud Drive or another storage provider. • Email or messaging applications. • Third-party document management or collaboration services. Exported information may contain personal data, property addresses, photographs, videos, or other sensitive records. Users are responsible for choosing appropriate storage destinations, protecting exported files, and sharing reports only with authorized recipients. App Lock does not automatically extend its protection to exported files. Tactical Planner recommends that users maintain secure backups and use appropriate security controls when transferring sensitive information.

7. Third-Party Services and Websites

Features may use Apple Maps and location lookup, device authentication, system contacts, document and sharing interfaces, and App Store purchase services. Map queries or location information used for a requested lookup may be processed by Apple. Export destinations and other providers handle information under their own policies. Our website hosting and delivery providers may process standard request information, such as IP address, browser, requested page and time, to deliver, secure and monitor the site. Pages may load external resources, including fonts or hosting monitoring scripts; those providers receive the network information needed for those requests and may use browser storage according to their services. Product-specific notices will explain any additional analytics, advertising, cloud or server-based processing before it is introduced.

8. Purchases and Subscriptions

Products may offer free access, paid purchases or subscription plans. Available plans and features are described in the applicable product and purchase screen. For App Store purchases, Apple processes payment under its terms. Tactical Planner does not require payment card numbers inside an application for Apple-managed purchases. Transaction and entitlement information may be processed to provide purchased access. A plan mentioned in this policy is not an assertion that subscriptions are enabled in every product.

9. How Information Is Used

Information is processed to provide the features you select: organizing properties, clients and tasks; documenting observations; calculating planning estimates; reviewing utility bills; creating reports and exports; applying preferences and security controls; and enabling purchased features where available. Support messages and attachments you send to Tactical Planner are used to respond to requests and investigate issues. Avoid sending unnecessary sensitive information. Routine use of locally stored application records does not grant Tactical Planner remote access to them.

10. Data Retention and Deletion

Information stored locally generally remains available until the user deletes it, removes the application, or an applicable operating-system or storage event affects it. Users may delete supported records through application features. Removing an application from a device may also remove associated locally stored application data. Separately exported files and backups may remain in their selected storage locations. Users are responsible for retaining any information they are legally or professionally required to preserve. For questions regarding information submitted directly to Tactical Planner through support communications, users may contact support@tacticalplanner.com.

11. Security

Tactical Planner uses application design and Apple platform security capabilities intended to reduce unauthorized access to user information. Available protections include local data storage and optional device-based application authentication. However, no device, application, transmission method, or storage system can be guaranteed completely secure. Users should maintain device updates, enable appropriate device security settings, protect exported files, and maintain independent backups of important information.

12. Children's Privacy

Tactical Planner products are intended for adults and professional or general planning use, and are not directed to children under 13. Do not submit children's personal information unless necessary, authorized and lawful. Contact support@tacticalplanner.com if you believe a child has provided personal information directly to us so we can investigate and address it.

13. Privacy Rights and Requests

Depending on applicable law and the circumstances, individuals may have rights concerning personal information processed by Tactical Planner.

Requests relating to information submitted directly to Tactical Planner may be sent to: support@tacticalplanner.com For information stored only on a user's device, Tactical Planner may not have technical access to retrieve, correct, or delete the information remotely. Individuals seeking access to information held by a real estate professional or other Tactical Planner products user may need to contact that user or organization directly.

14. International Use

Tactical Planner products may be used in different locations, subject to availability and applicable laws. Users are responsible for complying with privacy, property documentation, consent, and recordkeeping obligations that apply to their activities.

15. Changes to This Privacy Policy

Tactical Planner may update this Privacy Policy when features, services, legal requirements, or data-handling practices change. Updated policies will display a revised effective date and will be made available through an appropriate application or website location.

16. Contact Information

Tactical Planner Holdings LLC

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Privacy and support: support@tacticalplanner.com

Website: https://tacticalplanner.com