



Important Notice

Our Privacy Policy

Your Privacy Is Important to Us:

We highly value your trust and confidence, and we want to assure you that your personal information is kept completely confidential by us. As a Financial Advisory and Planning firm, we adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of all client information.

This Privacy Policy summarizes for you what information we collect about you, the limited times when we may share it with others, and how we protect your privacy.

What Personal Information Do We Collect?

Most of the personal information we collect is obtained by you. We collect personal information needed only to service and administer your business with us. The type of information that we collect depends on the type of product or service you request. This includes:

- Information you provide on an application or other form (for example, name, address, social security number, or income).
- Information about your business and history with us.
- Medical or health information you permit us to receive from doctors or other health care providers. This may include an application for insurance or when we process a claim, as approved by you. We do not share that medical or health information with unrelated companies, except as needed to process your transactions.

Is Personal Information Shared With Others?

We do not share any personal information about you to anyone without your express consent, except as permitted by law. The Law permits disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, to others who are assuring our compliance with professional standards (peer review), and the like.

How Do We Protect The Confidentiality And Security Of Your Personal Information?

Keeping your information confidential and secure is of utmost importance to us. We follow standard industry practices to actively protect the confidentiality, and integrity of your personal information. We also maintain physical, electronic, and procedural safeguards to guard your personal information. In so doing, we restrict access to your personal information to those employees who need to know that information in order to provide products or services to you. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violation.

What If You Become A Former Client?

Should you become an inactive client or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.