

PRIVACY POLICY

One of Liberty Financial Planning's primary client goals is to earn your trust and confidence by protecting your privacy. Your personal information is strictly confidential. We do not disclose *any* information about our clients to anyone, unless it is necessary to do so in providing our agreed upon services or required by law.

In addition, you should be aware of the following items concerning your nonpublic personal information.

Information Gathering

In conducting regular business, Liberty Financial Planning may collect nonpublic personal information from sources such as:

- Information reported by you on applications or other forms you provide to us
- Information reported by you through other verbal, written, or electronic communication
- Information about your transactions with us or others
- Information we receive as part of a consumer report

Information Disclosure

Liberty Financial Planning shares nonpublic personal information solely to service our client accounts in accordance with our agreed upon services. Otherwise, we do not disclose any nonpublic personal information about our clients or former clients to anyone, except as required by law.

Information Safeguarding

Liberty Financial Planning will internally safeguard your nonpublic personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic, and procedural safeguards that meet federal and state standards to guard your nonpublic personal information.

If you have any questions regarding our handling of your personal information, please feel free to contact us. We appreciate your business!