



# Privacy Policy

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Table Rock Financial Planning (TRFP) is committed to safeguarding the confidential information of all current, former, and potential clients. All personal information provided to the firm is held in the strictest confidence. TRFP uses the financial and health information you provide to help you meet your personal financial objectives, while guarding against any real or perceived infringements of your rights to privacy.

Table Rock Financial Planning has never disclosed information to nonaffiliated third parties, except as required by law or with the client's written consent, and does not anticipate doing so in the future. If TRFP were to anticipate such a change in policy, the firm would be prohibited under the law from doing so without advising you first.

## **Categories of information collected**

The categories of nonpublic personal information that TRFP may collect from a client depends upon the scope of the client engagement. These categories may include information:

- about your personal goals and financial objectives;
- about your personal finances and insurance;
- about your health, to the extent needed for the planning process;
- about transactions between you and third parties;
- from consumer credit and other data reporting agencies.

## **Information is kept private and sharing is limited**

Access to your information is limited. Only employees and agents who have a business or professional reason for knowing your information are allowed access. TRFP does not share information with nonaffiliated parties except as required or permitted by law, or with your consent. For example:

- Federal and state regulators may review client records as permitted by law;
- Federal and state regulations permit TRFP to share a limited amount of information about you with a financial services provider to execute transactions that you request or authorize;
- TRFP, with your knowledge and permission, may discuss your financial situation with your accountant or lawyer.

For nonaffiliated third parties that require access to a client's personal information, including financial service companies, consultants, and auditors, TRFP also requires strict confidentiality in dealings with them and expects them to keep this information private.

TRFP does not provide clients' personal information to mailing list vendors or solicitors.

## **Secure Environment**

TRFP maintains a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

## **Maintenance of Information**

Personally identifiable information about you will be maintained during the time you are a client, and for the period that such records are required to be maintained by federal and state laws, and consistent with the CFP Board's Standards of Professional Conduct.