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Peace of Money

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PRIVACY STATEMENT

Peace of Money, an independent financial planning firm, is committed to safeguarding the confidential information of its clients. I hold all personal information provided to my firm in the strictest confidence. These records include all personal information that I collect from you in connection with any of the services provided by Peace of Money. I have never disclosed information to third parties, except when a client has requested that I do so. It is possible that in the future I might be required by law to provide information as a result of a legal case. If I were to change my policy of not sharing information with third parties, I would be prohibited under the law from doing so without advising you first. As you know, I use health and financial information that you provide to me to help you meet your financial goals while guarding against any real or perceived infringements of your rights of privacy. My policy with respect to personal information about you is listed below:

- I maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- The categories of nonpublic information that I collect from a client depend upon the scope of the client engagement. They may include information about your personal finances, your health, and information about transactions between you and third parties (such as your 401(k) provider).
- For unaffiliated third parties which might require access to your personal information, including auditors, I also require strict confidentiality in my agreements with them and expect them to keep this information private. Federal and state regulators may review firm records as permitted under law.
- I do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose.
- Personally identifiable information about you will be maintained during the time your are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws, and consistent with the CFP Board Code of Ethics and Professional Responsibility. After this required period of record retention, all such information will be destroyed.