



## **PRIVACY POLICY**

Good Financial Advisors respects the privacy of our clients. We are entrusted with private, personal financial information, and we handle such information carefully in accordance with the following policy.

In the regular course of business, we may collect non-public client information from sources such as:

- Information reported by clients on questionnaires or other forms
- Conversations between clients and the firm's representatives
- Information from third parties

We do not disclose personal financial information about our clients to any person or entity, with the following exceptions:

- When required to provide services our clients have requested;
- When our clients have specifically authorized us to do so in writing; or
- When permitted or required by law.

Within our company, we restrict access to clients' personal financial information to the employees who need to know that information. To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect the privacy of our clients.

Personally identifiable information about our clients will be maintained during the time they are clients, and for the period of time that such records are required to be maintained by federal and state securities laws, and consistent with the CFP® Board Code of Ethics. After that time, the information may be destroyed.

We will provide our Privacy Notice annually, in writing. Former clients will not receive these notifications or mailings, but the other provisions of our privacy policy will still apply.

Clients with questions or concerns regarding our privacy policy and procedures should contact Garry Good, Principal, Good Financial Advisors.

*Good Financial Advisors Privacy Notice, March, 2007*