
PRIVACY STATEMENT

Protecting the privacy of our clients is important to us. Federal law requires us as a financial company to provide written notices to clients regarding disclosure of non-public personal information. The notice defines how we collect, share and protect the personal information of our clients.

I. INFORMATION WE COLLECT

Wise Planning collects nonpublic personal information about you from you, and with your authorization, from third parties such as accountants, insurance agents, mutual fund companies, banking and brokerage institutions and other advisors. This information can include social security numbers, bank and asset account numbers, account balances and assets and transaction history, and tax returns.

II. INFORMATION WE DISCLOSE

In the normal course of serving clients, information we collect may be shared with companies that perform various services such as custodians and cloud-based technology providers. It is our policy to review these company's privacy policies and to require them to safeguard such information and use it only for the purpose for which it was provided.

We will also disclose non-public personal information about our clients or former clients when required by law or authorized by the client. For example, if you authorize us to do so, we may disclose non-public personal information to unrelated third parties such as accountants, attorneys, insurance agents, or other advisors.

III. CONFIDENTIALITY AND SECURITY

Wise Planning restricts access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.