

Bob Goldman Financial Planning Privacy Policy

This privacy notice discloses Bob Goldman's information gathering and dissemination practices regarding nonpublic personal information about individuals who hire financial services from me.

I may collect nonpublic personal information about you from the following sources:

- Information I receive from you in meetings, telephone conferences and correspondence, as well as forms that I may ask you to complete.
- Information about your transactions with me, or others; and
- Information I receive from service providers.

I will not disclose any nonpublic personal information about my clients or former clients to anyone, except as permitted by law.

I restrict access to nonpublic personal information about you to those employees of my firm who need to know that information to provide services to you. I maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

I will not provide nonpublic personal information about you to a third party without your written approval.

If you have any additional questions about this privacy policy, or concerns regarding your personal information, please contact me at 415-331-1546 or email to bob@bgplanning.com or at 1807 Samish Crest Way, Bellingham, WA 92889.