COMPANY PRIVACY POLICY

At Symphony Financial Planning LLC, we are committed to preserving the confidentiality of the personal information we receive about you. The following information is provided to help you understand how we gather, use, and protect personal information.

We collect non-public personal information to provide the services you request or inquire about. Depending on the nature and scope of our engagement with you, you may provide us verbally, in correspondence, by providing statements, or by other means: identity information such as name, address, email address, birth date, and social security number; financial information such as assets, liabilities, income, account balances, transactions, and taxes; insurance information such as insurance policies; estate planning documents such as wills and trusts; and personal information regarding your life circumstances. We also may request information to fulfill regulatory requirements.

We understand the sensitivity of this information and its importance to you. We do not sell information about current or former clients. We will not share such information with any third party unless you or your representative have authorized it (e.g., to work with your tax or legal professional, employer, insurance company, or another investment firm), or, if necessary, to process a transaction, service an account, or as permitted or required by law. Additionally, we may share client information with outside companies that provide services for us. However, our contractual arrangements with these companies require them to treat your information as confidential.

We use security measures reasonably designed to protect the information we obtain about you. We maintain physical, electronic and procedural safeguards to protect your personal information. In addition, we restrict access to your information in our own offices to individuals who have a need to use that information in connection with their employment. Our Employee Confidentiality Policy restricts the use of client information and requires that it be held in strict confidence.

We will provide our Privacy Policy to current clients each year. You are a current client if you are an investment management client or if you are a financial planning client with a consultation still in progress. In addition, if we change our Privacy Policy in the interim, we will promptly inform our current clients.

The accuracy and safety of your personal information is important. If you need to correct or update your personal or account information, or if you have questions or concerns regarding our Privacy Policy, please do not hesitate to contact us.