

PRIVACY POLICY STATEMENT

The independent financial planning firm of George Papadopoulos, CPA/PFS, CFP® is committed to safeguarding the confidentiality, integrity and security of the personal information that is entrusted to us. We hold all personal information provided to our firm in the strictest confidence. The categories of nonpublic information that we collect from a client may include information about your personal finances, information about your health to the extent that it is needed for the planning process, information about transactions between you and third parties, and information from consumer reporting agencies. We use your information in helping you meet your personal financial goals while guarding against any real or perceived infringement of your rights of privacy. We will notify you in advance if our privacy policy is expected to change.

- We limit employee and agent access to information only to those who have a business or professional reason for knowing and only to nonaffiliated parties as required or permitted by law or by your consent. For example, federal regulations permit us to share a limited amount of information about you with a brokerage firm in order to execute securities transactions on your behalf, or so that our firm can discuss your financial situation with your insurance agent, accountant or lawyer.
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- For unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted under law.
- We do not share client information with other companies for marketing purposes.
- Personally identifiable information about you will be maintained during the time you 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 may be destroyed.