
Reed Financial Planning LLC

Privacy Statement

Reed Financial Planning LLC

In my work, I hold a lot of personal information about my clients. This information comes from a variety of sources, including the forms you fill out for me, statements and records you show me, conversations we have, and letters and e-mails you send me. Much of this information is nonpublic (that is, not publicly available). This could include information about your finances, your health, your goals and aspirations, transactions between you and third parties (such as your mutual fund companies) and information from consumer reporting agencies.

Our retainer agreement states that I will hold confidential any information you give me. I maintain a secure office and protected computer environment. I do not provide your information to mailing list vendors or solicitors for any purpose. Federal and state regulators may review my firm's records as permitted under law.

I may sometimes share information about you with others ("nonaffiliated third parties" in legal jargon) as permitted by law. For example, I may discuss your financial situation with your attorney or your accountant if such discussion is warranted and you have given your permission.

I will keep personally identifiable information about you as long as you are a client and thereafter for the time required by federal and state securities laws, and by the CFP Board Code of Ethics and Professional Responsibility. All personal information is destroyed after this time.

If you have any questions about the privacy of your information, please call or e-mail me and I will be happy to address them.

Robert Reed
Reed Financial Planning LLC