

Privacy Policy

**“Our most valued asset is your trust.
Our privacy policy is designed to preserve it.”**

We collect nonpublic personal information about you to serve your financial planning and investment management needs, fulfill our legal and regulatory requirements, and comply with the CFP® Board Code of Ethics and Professional Responsibility. This information may include:

- ❖ Information we receive from you on applications or forms, such as your name, Social Security number, date of birth, address and telephone number, and employer.
- ❖ Information about your financial affairs, such as financial statements, tax returns, brokerage or mutual fund statements, insurance policies, or estate planning documents.
- ❖ Information we obtain from others, such as your attorney, CPA, or insurance agent.

We hold nonpublic personal information about our clients in strict confidence. We do not disclose it unless you request that we do so or we are required by law. For example, we will disclose information to your attorney or CPA if you request that we do so or we are required by a legal or regulatory action.

We restrict access to nonpublic personal information to employees who need to know it to serve your financial planning and investment management needs or fulfill our legal and regulatory requirements. All employees are required to sign a confidentiality agreement as a condition of employment. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

Again, your trust is our most valued asset. If you have questions or concerns regarding our privacy policies, please let us know. We can be reached by telephone at (509) 838-4175 in Spokane or (888) 864-8827 toll-free, e-mail at info@assetplanning.com, or mail at 422 West Riverside Avenue, Suite 722, Spokane, WA 99201.