

Family First Financial Planning

Our Privacy Policy

Family First Financial Planning (the “Firm”) collects non-public personal financial information about its clients from the following sources:

- Information clients or their legal agent provide to complete their financial plan;
- Information clients provide in agreements, account applications, and other documents completed in connection with opening and maintenance of accounts;
- Information clients provide orally; and
- Information received from third parties, such as brokerage firms or custodians, about client transactions.

The Firm does not disclose non-public personal information about clients to anyone, except in the following circumstances:

- When required to provide services clients have requested;
- When clients specifically authorize the Firm to do so in writing; or
- When permitted or required by law.

To ensure security and confidentiality, the Firm maintains physical, electronic, and procedural safeguards to protect the privacy of its clients.