



# Wise Planning, Inc. Privacy Statement

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The Gramm-Leach-Bliley Act and the rules issued by the Federal Trade Commission regarding the Privacy of Consumer Financial Information require us as a “financial institution” to provide written notices to clients regarding disclosure of non-public personal information.

## I. INFORMATION WE COLLECT

Wise Planning, Inc. collects nonpublic personal information about you from you, and with your authorization, from third parties such as accountants, insurance agents, mutual fund companies, banking and brokerage institutions and other advisors.

## II. INFORMATION WE DISCLOSE

Wise Planning, Inc. does not disclose any non-public personal information about our clients or former clients to anyone except as required by law or as authorized by the client. If you authorize us to do so, we may disclose non-public personal information to unrelated third parties such as accountants, insurance agents, mutual fund companies, banking and brokerage institutions or other advisors.

## III. CONFIDENTIALITY AND SECURITY

Wise Planning, Inc. restricts access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.