Partners for Planning, LLC
Financial Planning and Investment Advisory Services

Privacy Notice

Protecting Your Privacy is Important to Us

At Partners for Planning, we are committed to safeguarding your personal information. We hold all personal information provided to us in the strictest confidence. Our privacy policy is simple. We do not share any information with anyone except as required or permitted by law. This notice provides you with information on our policy.

Information We Collect

We collect personal information about you that includes your name, address, telephone number, social security number, employment, investment objectives, and financial status including your personal financial assets and income. This information is gathered based on your replies to inquiries on applications, questionnaires, or other forms we ask you to complete or from tax returns, financial statements or other documents you provide to us. We also gather information from your financial transactions with us and others as well as through correspondence and discussions.

How We Use Your Information

We use your personal information to provide the services we offer. As the firm shares information solely to service our client accounts, we do not disclose any nonpublic personal information about current or former clients to anyone, except as permitted by law. At your request, we may share your information with other third parties that you select to provide services on your behalf including your attorney and accountant. We do not provide personally identifiable information to mailing list vendors or solicitors for any purpose.

How We Protect Your Personal Information

We restrict access to your personal information to those who need it to provide the services we offer you. In order to further guard your nonpublic personal information, we maintain procedural, physical, and electronic safeguards. Personally identifiable information will be maintained while you are a client and for the required period that records are required to be maintained by Federal and state laws. After this time, records will be destroyed in accordance with our retention policy.

Annual Notice

Annual Offer of Our Form ADV, Part II

As a registered investment advisor, we are obliged to offer our clients a copy of our Form ADV Part II annually. This disclosure brochure describes our planning and advisory services, background and fees and other important information. If you would like a copy, please contact us via email or phone.

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