

Koon Financial Planning & Consulting

Privacy Policy

Koon Financial Planning & Consulting (“KFP&C”) is dedicated to maintaining high standards of client confidentiality recognizing that clients provide us with private financial and personal information. We are committed to maintaining the confidentiality of that information and will not compromise relationships by disclosing personal information to any third party for independent use. Our clients are not only protected by federal and state laws, but by our commitment to this Privacy Policy.

We care about each client and consider the privacy of each client’s personal information to be an important element of public confidence and trust. We are committed to safeguarding that information. Our goal is to keep your information strictly confidential.

Some information comes directly from applications and forms. This information might include names, addresses, social security numbers, birth dates, assets, income, and accounts at other financial institutions.

We gather information about clients if we believe it is necessary or useful as part of our relationship with them to help us provide services to meet their needs. We do not disclose any nonpublic personal information about clients or former clients to anyone except as compelled to do so by law or federal or state regulatory authorities.

We may contract with outside service providers such as custodians and brokerage firms to prepare account statements, manage portfolios, or furnish software services. Where necessary, we will disclose information we have about clients to those third parties. In all such cases, we provide the third party with only the necessary information to carry out its assigned responsibilities and only for that purpose. These outside service providers agree to comply with our client confidentiality requirements and must abide by applicable laws.

We are committed to maintaining complete and accurate information about our clients and employ strict measures to ensure the accuracy, timeliness, and thoroughness of client information. If clients believe any information we have is incorrect, they should immediately notify us, and we will take prompt action to make all necessary corrections.

We maintain physical, electronic, and procedural safeguards to protect confidential information and continually assess new technology for protecting information and upgrade our systems when appropriate.

We will not accept communications from someone claiming to represent one of our clients unless he or she has been properly authorized in writing to represent them. If a client should end his or her relationship with us, we will continue to adhere to these policies.

We are required by federal law to provide clients with a copy of this Privacy Policy at least annually. A copy of the policy is available at any time upon request.