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## **Privacy Policy January, 2024**

We are committed to keeping the personal information collected from our potential, current, and former clients confidential and secure. The proper handling of personal information is one of our highest priorities. We want to be sure that you know why we need to collect personal information from you. We also want to explain to you our commitment to protect the information you provide to us.

### **Client Information**

We collect and keep only information necessary to provide services by you and to administer your business with us. We may collect nonpublic personal information:

When you complete an application or other form. This could include information such as name, address, social security number, assets, or income.

### **Sharing Information**

We only share your nonpublic personal information with non-affiliated companies or individuals as permitted by law, such as third-party administrators, or to comply with legal or regulatory requirements. In the normal course of our business, we may disclose information we collect about you to companies or individuals that contract with us to perform servicing functions such as:

- Clearing firms, such as Goldman Sachs or Altruist, that custody your assets
- Record keeping
- Preparation of statements
- Tax professionals who work for us or that you use
- Distribution of materials

When we provide personal information to a service provider, we require these providers to agree to safeguard your information, to use the information only for the intended purpose, and to abide by applicable law. **We do not sell, rent, or exchange your personal information with any outside person or business.**

### **Employee Access to Information**

Employees who have access to your personal information are educated on the importance of accessing that information only for legitimate business purposes, and maintaining the confidentiality and security of the information. They are required to abide by our information handling practices.

### **Protection of Information**

We maintain security standards to protect confidential information, whether written, spoken, or electronic. We update and test our systems to ensure the protection and integrity of our information.

### **Maintaining Accurate Information**

We strive to maintain accurate, up-to-date client records in accordance with industry standards. We have procedures in place to keep information current and complete. These procedures include responding to requests to correct inaccurate information in a timely manner.

### **Disclosure of our Privacy Notice**

We recognize and respect the privacy concerns of our potential, current, and former clients. We are committed to safeguarding this information. This Privacy Notice will be updated and distributed on an annual basis. It is also available to our clients upon request.