Clarus
FINANCIAL PLANNING
Brighten Your Financial Picture

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Privacy Policy

At Clarus Financial Planning, Inc. (Clarus), we respect the personal financial privacy of all our clients. We understand our clients have entrusted us with private, personal financial information, and it is important to us that employees and clients of Clarus know our policy concerning what we do with that information.

We collect personal financial information about our clients from the following sources:

- Information our clients provide to us to complete their financial plan
- Information our clients provide to us in agreements
- Information our clients provide to us orally
- Information we may receive from third parties, such as brokerage firms, about our clients' transactions with us or with others.

We do not disclose any nonpublic personal financial information about our clients to anyone, except in the following circumstances:

- When required to provide services our clients have requested
- When our clients have specifically authorized us to do so in writing
- When permitted or required by law

Within Clarus, we restrict access to clients' personal financial information to the employees who need to know that information. To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect the privacy of our clients.

In addition, employees understand that everything handled in this office is private and confidential. Nothing about our clients is discussed outside our offices with family, friends or other clients; employees only discuss what is needed to complete the job. Most importantly, we never discuss a client's situation with someone else who may request information about an account unless we are specifically authorized in writing by the client to do so. This includes giving information to a husband on his wife's IRA account, to a son or daughter about their mom or dad's accounts, etc.