

Privacy Policy

Due to the personal and confidential nature of information at our disposal, we carefully handle all client information with confidentiality in mind. All conversations between clients and Prism representatives are kept strictly confidential. Other than in the course of providing services for our clients utilizing outside vendors, client names and the contents of client files are not disclosed to any other party unless required by law or court order.

Prism Financial Planning, LLC, and its representatives, Amy Goan and Rachel Sehayek, may share limited client information with third-party service providers that we use as tools in the financial planning process. We share only the minimum information necessary for these providers to perform their functions, and only for the purpose of delivering services you have engaged us to provide. We do not disclose client information to any other individual or organization without your written authorization, except as required by law.

Client paper files are scanned and saved on a password-protected secure document-storage website, then shredded or returned to the client.

Clients can upload and download documents securely to their password-protected folder at ShareFile. Since clients create their own passwords, they are responsible for not sharing them with anyone else, as doing so would grant access to their folder.

Additionally, we will not act upon any information given to us that is non-public.

Protecting and serving the best interests and privacy of our clients is of paramount importance. Should you have any questions about these policies and procedures, please call our office.