

## **Privacy Policy**

Prism Financial Planning, LLC, and its representative, Amy Goan, CFP®, does not share client information with any other individual or organization unless client authority is granted in writing. This also applies to any current or future representatives of Prism.

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.

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 they create their own password, they are responsible for not sharing it with anyone else, who would then have 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.