



Privacy Policy

At Oliver Financial Planning (OFP), we respect the personal financial privacy of all our clients and customers – past, present, and future. We understand that our clients have entrusted us with private personal financial information, and it is important that all employees, officers and clients of OFP 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 and questionnaires;
- Information our clients provide to us orally; and
- Information we may receive from third parties with our clients' permission.

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 and specifically authorized us to do so in writing; or
- When permitted or required by law.

Within our company, 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, we stress and mandate with our employees and officers that everything handled in our office is private and confidential. Employees are instructed to only discuss what is needed to complete the job. We do not discuss a client's situation with any third party, including non-client family members, unless specifically authorized in writing to do so by the client.

References to "employees" may also refer to non-compensated "interns" as well as "independent contractors" hired by our company to complete work for our clients.