

Privacy Policy

January 30, 2024

Oliver Financial Planning, LLC

A State of Michigan Registered Investment Advisor

At Oliver Financial Planning, LLC (OFP), we respect and protect our clients' privacy. This document explains our approach to privacy and confidentiality.

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

- Information our clients provide us in agreements, questionnaires, and applications,
- Information our clients provide us orally, and
- Information we receive from third parties with our clients' permission.

We do not disclose nonpublic personal financial information about our clients to anyone outside of OFP except under the following circumstances:

- When required to provide services our clients have requested and specifically authorized in writing, or
- When permitted or required by law.

We restrict access to clients' personal information within our company to the employees¹ who need to know that information. 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 discuss only 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 to do so by the client.

To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect the privacy of our clients. We periodically hire independent consultants to review and recommend improvements to our technology security.

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

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