



Planning Within Reach

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PWR Privacy Policy

We respect the privacy of all our clients and prospective clients, both past and present. We recognize that you have entrusted us with non-public personal information and it is important to us that all employees and clients of our firm know our policy concerning what we do with that information.

Planning Within Reach, LLC collects non-public personal financial information about its clients from the following sources:

- Information our clients provide to us to complete their financial plan or investment recommendations;
- Information our clients provide in agreements; and
- Information clients provide orally.

Email is not secure. If you send information insecurely, there is nothing Planning Within Reach, LLC can do to protect it.

The firm does not disclose non-public information about 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 (i.e., periodic regulatory examination).

To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect the privacy of client information.

We will notify you annually of our privacy policy per federal law and at any time, in advance, if our policy is expected to change.