



## **Privacy Statement**

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on applications and other forms
- Information about your transactions through us or others
- Information we receive from a consumer reporting agency

We may disclose all of the information we collect, as described above, to nonaffiliated third parties that perform services on our behalf for your accounts, or otherwise as we are required or permitted by law (e.g. subpoena, fraud investigation, regulatory reporting, IRS, etc.).

Anders Financial Planning restricts access to your personal and account information to employees and Advisors who need to know that information to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

You, Client, agree to not share information gathered via our Advisor/Client relationship with parties outside of the Client Agreement Letter agreement.

Client Name: \_\_\_\_\_

Client Signature: \_\_\_\_\_

Client Name (if applicable): \_\_\_\_\_

Client Signature: \_\_\_\_\_

Date: \_\_\_\_\_