Privacy Policy

At Conklin Financial Planning, we respect the personal financial privacy of all our current, former and potential clients. All personal information provided to our firm is held in the strictest confidence. It is important to realize that we understand our clients have entrusted us with private personal financial information, and it is important to us that all employees, officers and clients of our firm 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, account applications, and other documents completed in connection with opening and maintenance of their accounts;

Information our clients provide to us orally; and

Information we may receive from third parties, such as, brokerage firms, consumer credit reporting agencies, about our clients' transactions with us or with others.

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;

When our clients have specifically authorized us to do so in writing; or

When required or permitted by law.

We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

Personally identifiable information about our clients will be maintained during the time you are a client, and for the period that such records are required to be maintained by federal and state laws, and consistent with the CFP Board's Standards of Professional Conduct.