



## ***Privacy Policy***

White Oak Financial Planning, Inc. is committed to protecting the confidentiality of all personal information entrusted to us. This includes the personal information of all current, former, and potential clients.

Categories of nonpublic information that we collect from you may include information about your personal finances, your personal goals and health to the extent needed for the financial planning process, and transactions between you and third parties. We use this information to help you meet your personal financial goals.

It is our policy not to disclose any nonpublic personal information about you unless you have expressly directed us to do so, or unless required by law.

We do not provide your personal information to mailing list vendors or solicitors.

We restrict our records to only those persons who have a need to obtain information in order to deliver advisory or administrative services. We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review firm records as permitted by law.

Personally identifiable information will be maintained during the time you are a client, and for any period after that as required by federal and/or state securities laws and consistent with the CFP<sup>®</sup> Code of Ethics and Professional Responsibility. After that time, the information may be destroyed.

We will provide our Privacy Policy to you annually, in writing. Former clients will not receive these notifications or annual mailings, but the other provisions of our privacy policy will still apply.