

Privacy Notice

Snider Talbot Financial Planning, LLC

03.01.2025

As a professional advisor, your privacy is very important to Snider Talbot Financial Planning, LLC. This notice provides you with a brief description of our privacy policies.

- What non-public information does Snider Talbot Financial Planning, LLC collect...?

Federal law requires that we provide you notice of non-public information about you that we collect. Non-public information is any personal information about you that cannot be found in public sources (e.g. Social Security number, financial account information, and balances).

Our fiduciary responsibilities require us to review all relevant, non-public, information in order to make certain that we are providing appropriate recommendations. Specific items of non-public information may include, but are not limited to, date of birth, Social Security number, financial account information and balances, sources and amounts of income, credit card numbers, home address and telephone numbers.

- What policies and procedures does Snider Talbot Financial Planning, LLC have in place to protect your non-public information...?

Snider Talbot Financial Planning, LLC restricts access to non-public information about you to only those persons that provide financial planning services to you. We maintain physical, electronic, and procedural safeguards to comply with Federal standards to guard your confidential personal information.

- Does Snider Talbot Financial Planning, LLC disclose or reserve the right to disclose non-public information to unaffiliated third parties...?

Snider Talbot Financial Planning, LLC does not disclose any confidential information about our clients or former clients, except as permitted by law. Examples of disclosures permitted by law include, but are not limited to, disclosure after client consent, disclosure to provide information to agencies assessing compliance with industry standards and to our attorneys, accountants and auditors, or disclosure to respond to a client dispute or inquiry.

Please do not hesitate to contact us if you have any questions about anything included in this notice.