

Privacy Statement

White Lighthouse Investment Management (WLIM), an independent financial planning firm, is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information, such as name, address, social security number, and other information that we collect from you in order to provide our services. We do not disclose information to unaffiliated third parties, except as permitted by law and as required to provide our services, such as to communicate with your custodian for matters related to accounts under our management.

Our policy with respect to personal information about you is listed below.

- We limit access to information only to those who have a business or professional reason for knowing, and only to unaffiliated parties as permitted by law. For example, federal regulations permit us to share a limited amount of information about you with a brokerage firm in order to execute securities transactions on your behalf, or so that our firm can discuss your financial situation with your accountant or lawyer.
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk. WLIM abides by its Data Security Policy, which is updated annually and addresses the protection of physical and electronic information for our clients and the firm.
- The categories of non-public personal information that we collect from a client depends upon the scope of the client engagement. It will include information about your personal finances, transactions between you and third parties, and information from other sources as needed to provide our services on your behalf.
- When an unaffiliated third party requires access to your personal information, such as custodians, your consultants, and auditors, we also require strict confidentiality in our agreements with them and expect this information to be kept private. Federal and state regulators may also review firm records as permitted under law.
- We do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose.
- Personal information about you will be maintained during the time you are a client, and for the required time thereafter that such records are required to be maintained by federal and state securities laws, and consistent with the CFP Board Code of Ethics and Professional Responsibility. After this required period of record retention, all such information will be destroyed.