



**HOLLY DONALDSON**  
— FINANCIAL PLANNING, LLC —

## Privacy Statement

We believe the confidentiality and protection of customer information is one of our fundamental responsibilities. While information is critical to providing quality service, we recognize that one of our most important assets is our customers' trust. Thus, the safekeeping of customer information is a priority for us.

As a general policy, we will not disclose personal financial information about any client to non-affiliated third parties except as necessary to establish and manage the client's account(s) as required by law, to demonstrate compliance with state or federal laws or regulations, or otherwise as directed by a client. In these situations, personal financial information about a client may be provided to broker/dealers or other account custodians.

In addition, we will restrict access to clients' non-personal financial information to those employees who need to know such information in order to provide specific services to clients.

We will maintain physical, electronic, and procedural safeguards to guard each client's personal financial information. Such safeguards include restricting the use of any information contained on any client questionnaires to our Chief Compliance Officer or such other persons the Chief Compliance Officer deems as needing to know the information.

Any hard copy of client personal financial information will be maintained in our central files, and will be secured (locked) after normal business hours.

Electronic access to client personal financial information will be restricted to the client's Chief Compliance Officer. We have established security standards and procedures to guard against unauthorized access to customer information.

Each client will be provided with a copy of our Privacy Statement upon engagement. In addition, each active client will be provided with a copy of the Privacy Statement at least annually.