



WWA Planning & Investments
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PRIVACY POLICY

Financial planners and investment advisors, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. We have been, and continue to be, bound by professional standards of confidentiality that are at least as stringent as those required by law. So even before we were required to, we have always protected our clients' right to privacy. WWA is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

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

With your permission, we disclose limited information to attorneys, accountants, insurance agents and mortgage lenders with whom you have established a relationship.

You may opt out from our sharing information with these unaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person.

With your permission, we share a limited amount of information about you with your investment advisor(s) or brokerage firm(s). We maintain a secure office to ensure that your information is not placed at unreasonable risk.

We do not provide your personal information to mailing list vendors or solicitors. 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 our Company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter as required by federal and state securities laws. After that time, information will be destroyed.

We will notify you in advance if our privacy policy is expected to change.

We are required by law to deliver this Privacy Statement to you annually, in writing.