Lakeside
FINANCIAL PLANNING

1500 District Avenue
Burlington, MA 01803

Privacy Policy

At Lakeside Financial Planning, LLC we respect the personal financial privacy of all our clients. We understand our clients have entrusted us with private personal financial information, and it's important to us that all of our clients understand our privacy policy and how information provided to us is treated.

We collect personal financial information about our clients from the following sources:

- Information our clients provide to us orally, in writing, via email, or any other means of communication to complete their financial plan;
- Information our clients provide to us in agreements, account applications, and other documents completed in connection with the opening and maintenance of their accounts;
- Information we may receive from third parties, such as brokerage firms, CPAs and attorneys, about our clients' transactions with us or with others.

We do not disclose any nonpublic personal financial information about our clients to anyone, except in the following circumstances:

- When it is required to provide services our clients have requested;
- When our clients have specifically authorized us to do so in writing; or
- When permitted or required by law.

At Lakeside Financial Planning, LLC we maintain physical, electronic, and procedural safeguards to protect the privacy of our clients. Everything handled in our office is treated as private and confidential. Nothing about our clients is discussed outside our offices with family, friends or other clients. Most importantly we never discuss a clients' situation with someone else that may request information about an account unless we are specifically authorized to do so by the client in writing. This may include, but is not limited to, giving information to a husband (who is not a client) on his wife's brokerage account, or to a son or daughter about their parent's accounts, etc.

August 30, 2016