



1500 District Avenue
Burlington, MA 01803

Privacy Policy

At Lakeside Financial Planning (“Lakeside”) we have the utmost respect for your personal financial privacy. We understand that you have entrusted us with private personal financial information, and it’s important to us that you understand our privacy policy and how information provided to us is treated.

Lakeside is committed to maintaining the confidentiality, integrity, and security of the personal and financial information that is entrusted to Lakeside Financial Planning. The categories of nonpublic information that Lakeside collects 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, and information about transactions between you and third parties. Lakeside Financial Planning uses this information to help you meet your personal financial goals.

All information and advice furnished by you to Lakeside Financial Planning will be treated as confidential and will not be disclosed to unaffiliated third party professionals except to carry out financial planning duties. Lakeside Financial Planning may share a limited amount of information about you with your financial services firms in order to execute securities transactions on your behalf. Additionally, Lakeside may disclose limited information to unaffiliated third-party professionals including, but not limited to; attorneys, insurance advisors, mortgage brokers and CPA’s, when appropriate to properly perform its financial planning obligations. Lakeside Financial Planning requires strict confidentiality when collaborating with unaffiliated third parties that require access to your personal information. Federal and state securities regulators may review Lakeside’s records and your personal records as permitted by law.

Lakeside Financial Planning maintains an agreement with another qualified advisor to substitute for Lakeside’s Principal Advisor, Jared Hoole, should he be unable to perform his duties due to temporary disability, permanent disability, or death. Should this happen, your personal information may need to be disclosed to the substitute advisor. The substitute advisor is identified in Lakeside’s Form ADV Part 2 Firm Brochure. In the event of Mr. Hoole’s temporary disability, the substitute advisor will assume Mr. Hoole’s normal duties until Mr. Hoole’s return. In the event of Mr. Hoole’s permanent disability or death, the substitute advisor will offer to help you transfer to substitute advisor’s practice or that of another advisor, at your election.

Lakeside maintains a secure office and computer environment to ensure that your information is not placed at unreasonable risk. Lakeside Financial Planning does not provide your personal or financial information to mailing list vendors or solicitors. Personally identifiable information about you will be maintained while you are a client, and for the period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed. Lakeside Financial Planning will notify you in advance if our privacy policy is expected to change.