

## 2018 PRIVACY DISCLOSURE

# Treybourne Wealth Planners

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[www.treybournewealth.com](http://www.treybournewealth.com)

Treybourne Wealth Planners' primary client goal is to protect your privacy.

To conduct regular business, we may collect non-public personal information from sources such as:

- Information reported by you on applications or other forms you provide to us.
- Information about your transactions with us, our affiliates, or others.

As the Firm shares non-public information solely to service our client accounts, we do not disclose any non-public personal information about our customers or former customers to anyone, except as permitted by law.

To provide the utmost in service, we may disclose the information below regarding customers and/or former customers, as necessary, to companies to perform certain services on our behalf or to other financial institutions with whom we have joint marketing agreements, or as required by law:

- Information the firm receives from clients on applications (name, social security number, address, assets, etc.).
- Information about client transactions with our firm or others (account information, payment history, parties to transactions, etc.).

At times, we may disclose non-public personal information to affiliated third parties. We may share any of the information that we collect as described above. We may disclose, with your permission, non-public personal information about you to the following types of affiliated third parties:

- Financial service providers such as mortgage brokers, insurance companies, or custodians.

### ***Information Safeguarding***

Treybourne Wealth Planners will internally safeguard your non-public personal information by restricting access to only those employees who provide products or services to you or those who need access to your information to service your account. In addition, we will maintain physical, electronic and procedural safeguards that meet federal and/or state standards to guard your non-public personal information.