

Disclosures

Milestones Financial Planning, LLC, dba Fox & Company Wealth Management (FWM), is a Registered Investment Advisory firm located in Kentucky, and FWM and its associated may register or meet certain exemptions to registration in other states in which we conduct business. FWM is operated by Johanna Fox Turner, CPA, CFP®, RLP® and Michelle Neiswender, MBA, CFP® and specializes in serving physician families. FWM provides Fee-Only® comprehensive financial planning and investment management advisory services. FWM seeks to coordinate support among clients' tax, legal, insurance, and real estate advisors.

Privacy Policy

A primary goal of Fox & Company Wealth Management is to protect your privacy. To conduct regular business, we may collect nonpublic 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 or others.
- FWM shares nonpublic information solely to service our client accounts. We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as required or permitted by law.

To serve our clients, we may disclose the information below regarding customers and/or former customers, as necessary, to companies and financial institutions to perform certain services on our behalf, with our clients' permission and/or as required by law.

- Information FWM receives from clients on applications (name, social security number, address, assets, etc.)
- Information about client transactions with FWM or others (account information, payment history, etc.)
- Information regarding other assets & liabilities, insurance policies, and legal documents.

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

- Financial service providers such as third party custodians
- Insurance agents, financial planning support resources, accountants, attorneys and other professionals based upon the work that our clients have asked us to perform.
- Fox & Company CPAs, Inc., which is a nonfinancial company related by common ownership through Johanna Fox Turner.

To limit our sharing or to opt out, please call (270) 247-0555.

Information Safeguarding

Fox & Company Wealth Management uses security measures that comply with federal and/or state standards to safeguard your nonpublic personal information. We maintain physical, electronic, and procedural safeguards which include file shredding, secure offsite backup, passwords, and encrypted websites, as well as physically securing our office files and client information. FMW restricts access to only those employees who provide services to you or those who need access to your information to service your account. In addition, FMW is hyper-vigilant about maintaining the confidences of our clients and protecting the identity of our clients. We do not discuss anything about our clients with people outside our offices, including family members and CPA firm members.