

Privacy Policy

Kelly Financial Planning, LLC is committed to safeguarding the confidential information of its current, former and potential clients. It is our policy to hold all personal information in the strictest confidence. We have never disclosed information to nonaffiliated third parties, except as required by law or by your consent, and do not anticipate doing so in the future. If we were to anticipate such a change in firm policy, we would be prohibited under the law from doing so without first advising you.

Personal information collected from you by us is in connection with services or potential services provided by Kelly Financial Planning, LLC. We use your information in helping you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy. Our policy with respect to personal information about you is listed below.

Information Kept Private; Sharing Limited to Need to Know

Access to all current and former clients' information is restricted. Only employees who need to know that information, in order to provide services to the client and have signed our Policy on Confidentiality, are allowed to have access to client information.

We do not share clients' information with nonaffiliated parties except as required or permitted by law or with your consent. We may disclose clients' information if we are previously authorized by the client to disclose the information to unaffiliated third parties (including, but not limited to, the client's other professional advisors and/or service providers, such as, attorney, accountant, insurance agent, broker-dealer, etc.), are required to do so by a judicial or regulatory process, or are permitted to do so in accordance with the applicable federal and/or state privacy regulations.

We do not provide your personally identifiable information to mailing list vendors or solicitors for a purpose.

Secure Environment

We maintain a secure office and computer environment to ensure that client information is not placed at unreasonable risk.

Categories of Information Collected

The categories of nonpublic personal information that we collect, from you, depends upon the scope of the client engagement. These categories may include information about your personal finances, insurance, personal goals, health (to the extent that it is needed for the planning process), information from consumer reporting agencies, and information about transactions between you and third parties.

Maintenance of Information

Personally identifiable information about you will be maintained during the time you are a client, and for the period that such records are required to be maintained by federal and state laws.

We take your privacy very seriously and are fully committed to its protection. If you have any questions regarding our Privacy Policy, please do not hesitate to contact us.