

## PRIVACY STATEMENT

### SUMMARY

Financial Alternatives, Inc., is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us. We are required by law to deliver this *Privacy Statement* to you annually, in writing.

The categories of nonpublic information that we collect 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, information about transactions between you and third parties, and information from consumer reporting agencies, etc. We use this information to help you meet your personal financial goals.

We may disclose information to effect transactions directed by you, to protect against fraud, or to comply with requests from law enforcement, securities regulators, etc. We do not provide your personal information to mailing list vendors or solicitors.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier, secure data encryption techniques and authentication procedures in our computer environment. We require strict confidentiality in our agreements with non-affiliated companies that require access to your personal information, including financial service companies, consultants, and auditors.

Personally identifiable information about you will be maintained while you are a client, and for an indefinite period thereafter that is no less than the period required to be maintained by federal and state securities laws. After that time, information may be destroyed.

### YOUR RIGHTS

You have the right to restrict the sharing of personal and financial information with affiliated companies (companies we own or control) and non-affiliated companies (outside companies that we do business with). Nothing in this form prohibits the sharing of information necessary for us to follow the law, as permitted by law, or to give you the best service on your accounts with us.

### YOUR CHOICES

Unless you choose "No" where indicated, we may share personal and financial information about you with affiliated or non-affiliated companies.

- No, please do not share personal and financial information with your affiliated companies.
- No, please do not share personal and financial information with your non-affiliated companies.

You may make your privacy choices at any time. Your choices marked here will remain unless you choose otherwise. If we do not hear from you we may share some of your information with affiliated companies and outside companies that we do business with.

To exercise your choices, do any the following: (1) Fill out, sign and mail back this form to us; (2) Call (858)459-8289; (3) Email [info@financialalternatives.com](mailto:info@financialalternatives.com); (4) Fill out, sign and fax this form to (858)459-8258.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (Print): \_\_\_\_\_