



SOARES FINANCIAL, INC. Your Personal Finance Coach

Privacy Policy

During the preparation of financial plans and tax returns and when providing related consulting, you share confidential personal information with us. We value your trust and make every effort to deserve your confidence. Protecting your privacy is important to us. State and federal laws, and the standards of NAPFA and the CFP® Board of Standards, pledge us to keep your information confidential unless we have your permission or are required by legal authority to divulge the information

We take strong measures to secure your confidential data. We believe we use the most current technology to protect the confidentiality of your information. If, in the rare event a breach were to occur, we will notify you as soon as the event or perception of such becomes known to us. It is important you keep us notified of your current telephone number and e-mail address so we may contact you if such becomes necessary.

Your personal information is stored in a secure space. If you ever discontinue your client relationship with us, we will be happy to furnish you with a copy of the information in our files and will continue to protect and treat the information that you have trusted us with as confidential. When your personal information is no longer needed, it is shredded, erased or destroyed.