

# PRIVACY STATEMENT

## *Simmer Financial Planning, LLC*

**Simmer Financial Planning, LLC** (a state registered investment adviser) is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of non public 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 personal financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g. credit reports. We use this information to help you meet your personal financial goals and to prepare your personal financial plan.

**With your permission** we may disclose limited information to attorneys, accountants, insurance companies and lenders with whom you have established a relationship. You may opt out of our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. **With your permission** we may share a limited amount of information about you with your brokerage firm in order to help them execute securities transactions on your behalf.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We do not provide your personal information to any mailing list vendors or solicitors. State securities regulators may review our company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by state securities laws and by federal and state tax laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this **Privacy Statement** to you annually, in writing.