



WWA Planning & Investments  
205 Washington Street  
Columbus IN 47201

Phone: 812 or 877 / 379-1120  
EMAIL: [ADVISOR@WWAFP.COM](mailto:ADVISOR@WWAFP.COM)

---

As required by law, we are sending you our privacy policy for your records:

### **PRIVACY POLICY**

Financial planners and investment advisors, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. We have been, and continue to be, bound by professional standards of confidentiality that are at least as stringent as those required by law. So even before we were required to, we have always protected our clients' right to privacy.

#### Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information such as Social Security and investment account numbers which you provide to us or which we obtain with your authorization.

#### Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as permitted or required by law. Permitted disclosures include providing information to our employees. Required disclosures include court orders for information with which we must comply. In all such situations, we stress the confidential nature of information being shared.

#### Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to the services we provide so that we are better able to assist you with your ongoing needs and, in some cases, to comply with legal or professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic and procedural safeguards that comply with legal requirements as well as our professional standards.



Please call if you have any questions. Your privacy, our professional ethics and the ability to provide you with quality financial services are all very important to us.

*FINANCIAL ADVICE AS INDIVIDUAL AS YOU ARE<sup>SM</sup>*

WWA Planning & Investments is A Registered Investment Advisor

rev. 2015-11-01