Elwood & Goetz

FINANCIAL PLANNING INVESTMENTS

Privacy Policy

Investment Advisors, like all providers of personal financial services, are required by law to inform their clients of internal policies regarding the privacy of nonpublic personal information. As a Registered Investment Advisor, we are bound by professional standards of confidentiality that are even more stringent than those required by law.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information that is either provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained in the course of our practice, except as required or permitted by law.

Permitted disclosures include providing information to our employees and, in limited situations, to unrelated third parties who need the information to assist us in providing services to you. In all such situations, we stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Client Information

We retain records relating to the professional services we provide in order to better assist you and to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Please contact us if you have any questions, and rest assured that your privacy is of the utmost importance to us.

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October 2, 2025