

# **ABUNDANCE WEALTH COUNSELORS, LLC**

## **Client Privacy Notice**

**2009**

Abundance Wealth Counselors, LLC (AWC), is committed to safeguarding your privacy. While the information we collect about you is critical to providing superior products and services, be assured that we are dedicated to maintaining the confidentiality of your personal information. Some organizations will rent or sell your personal information, however our policy is to protect the information you have entrusted to us.

To help you understand how we protect your personal information, this notice describes our current privacy policy and practices. During the continuation of your relationship with AWC, we will advise you of our privacy policy and best practices as required by law, at least once annually via electronic communication, along with posting it on our website.

### **Confidentiality And Security**

AWC maintains strict policies and procedures to protect the confidentiality of your information during all stages of your relationship with us. To protect your personal information from unauthorized access and anticipated threats or hazards, we maintain administrative, technical and physical safeguards that meet or exceed industry best practices. Access to your information by AWC team members is authorized to those individuals having a business need.

### **Information We May Collect And Use**

We collect personal information about you to provide and administer financial products and services. The type of information we collect depends on the products and services being provided to you. For example, we may collect identifying information such as your name, address, telephone number, and we may collect other personal/financial information.

We may gather information from meeting with you in person, by telephone, in writing and electronically. We may also acquire information from other sources, including other companies with whom you do business. While most information is collected when you initially contract for services, additional information is often required to properly administer or to reallocate assets in your investment accounts.

### **Information We May Disclose**

AWC regards all your personal and financial information as confidential. However, in the course of conducting our business, there are circumstances in which we may disclose to other parties information we have about you. These disclosures are only made as permitted by law.

Periodically, we may work with outside firms to help us develop our services and marketing approaches. As permitted by law, we may share with such firms certain identifying and transaction information, as described above. We may also share this type of information with affiliates of AWC, e.g., in connection with providing accounting and tax services, to better meet your needs and advise you of the full array of financial products and services we have to offer. Whenever we recommend or partner with service providers to help us conduct our business, we require them to maintain the confidentiality of your personal information and abide by all applicable privacy laws. Further, we do not authorize them to use or disclose your personal information for any purpose other than the work they are performing on our behalf or as required by law.

Should your relationship with AWC end, we will continue to limit disclosures of your personal information in accordance with our stated Privacy Policy and best practices just as we do for those with a continuing relationship with us.

Please address inquiries to Abundance Wealth Counselors, LLC, 232 Regent Court, State College, PA 16801.

