CommonWealth Financial Planning, LLC, a Virginia registered investment adviser, is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us. The categories of nonpublic information that CommonWealth collects from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. CommonWealth uses this information to help you meet your personal financial goals.

With your permission, CommonWealth will disclose limited information to attorneys, accountants, and other financial professionals with whom you have established a relationship. You may opt out from our sharing information with these non-affiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person.

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CommonWealth requires strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our company records and your personal records as permitted by law.

We will maintain personally identifiable information about you while you are a client, and for the required period thereafter that federal and state securities laws require. After that time, we may destroy your information. CommonWealth Financial Planning, LLC is required by law to deliver this privacy policy to clients annually, in writing.