



Privacy Policy

Collecting Information

Goddard Financial Planning, Inc. ("GFP") collects information about you to help us serve your financial needs, to provide customer service, and to fulfill state and federal legal and regulatory requirements. Any personal information is used to support these normal business operations and to service your account.

GFP collects non-public, personal financial and health information about you from information we receive from you. The sources and the information collected may include:

- Information included on applications and related forms such as your name, address, Social Security number, assets and income.
- Information regarding your transactions with us, like services purchased, account balances and payment history.
- Information from consumer reporting agencies such as credit relationships.
- Information from your employer, association or benefit plan sponsor such as name, address, Social Security number, assets and income.

Sharing Information

GFP does not disclose non-public personal information about you, including your engagement as a client, to anyone. However, in the course of servicing your account, and only with your written direction, we may share information described above with other unaffiliated providers such as insurance companies and brokers, mutual fund companies, banks, securities brokers or investment firms if we agree in advance that their assistance is helpful for implementing your financial plans. We may also disclose your information to other organizations such as government agencies and law enforcement officials, e.g., for tax reporting under court order, or other organizations and individuals, e.g., attorney or tax professional, with your consent.

Protecting your information

GFP maintains physical, electronic and procedural safeguards to protect your non-public personal information to be sure we are complying with our own policy, industry practices and federal or state regulations. If you decide to become an inactive customer, we will continue to adhere to this privacy policy and the practices described herein.