

**Beach Financial Advisory Service
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Important Privacy Policy Information

Beach Financial Advisory Service, an independent financial planning firm, is committed to safeguarding the confidential information of its clients. I hold all personal information provided to my firm in the strictest confidence. These records include all personal information that I collect from you or receive from other firms in connection with any of the financial services provided by my firm. I do not disclose information to nonaffiliated third parties, except as permitted by law.

As you know, I use health and financial information that you provide to me to help you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy. I have no employees and I maintain a secure office and computer environment. I do not provide your personally identifiable information to mailing list vendors or solicitors for any purpose. I will maintain your personal information during the time you are a client, and for the required time thereafter that such records must be maintained to meet federal and state securities laws and consistent with the CFP Board Code of Ethics and Professional Responsibility. After this period of record retention, all such information will be destroyed.