

## PRIVACY POLICY

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At Ford Financial Solutions, LLC, maintaining our clients' trust and confidence is of the utmost importance. We are committed to safeguarding your personal information and providing you with the facts about how your information is handled. All personal information provided to our firm is held in the strictest confidence. These records include personal information we collect from you in connection with any services or potential services provided by Ford Financial Solutions, LLC.

We do not share information with affiliated companies. Nor have we ever disclosed information to nonaffiliated third parties, except as required by law or by your consent, and do not anticipate doing so in the future. If we were to anticipate such a change in firm policy, we would be prohibited under the law from doing so without advising you first.

We use your information in helping you meet your personal financial goals while guarding against any real or perceived infringements of your rights of privacy.

### OUR POLICY WITH RESPECT TO PERSONAL INFORMATION ABOUT YOU IS:

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- Information Kept Private
- Sharing Limited to Need to Know

Access to your information is limited. Only employees and agents who have a business or professional reason for knowing your information are allowed access.

We do not share information with nonaffiliated parties except as required or permitted by law or by your consent. For unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. For example, federal and state regulators may review firm records as permitted under law. We do not provide your personally identifiable information to mailing list vendors or solicitors.

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**F O R D F I N A N C I A L S O L U T I O N S , L L C**

P.O. Box 109, New York, NY 10024

212.799.0631 | [www.fordfinancialsolutions.com](http://www.fordfinancialsolutions.com)

## SECURE ENVIRONMENT

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We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.

## CATEGORIES OF INFORMATION COLLECTED

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- Information our clients provide to us to complete their financial plan;
- Information our clients provide to us in agreements and other documents completed in connection with the starting and maintenance of their financial plan;
- Information our clients provide to us orally; and
- Information we may receive from third parties about our clients' transactions with us or with others.

## MAINTENANCE OF INFORMATION

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Personally identifiable information about you will be maintained during the time you are a client, and for the required time that such records are required to be maintained by federal and state securities laws, and consistent with the CFP® Board Code of Ethics and Professional Responsibility.

If you are satisfied with the way your personal information is collected and handled you do not need to take any action at this time. This notice replaces all previous statements of our consumer privacy policy, and may be amended at any time. We will provide you with annual reminders of our policies and with revised policies if there are any changes in how we handle your personal information. If you have any questions about this privacy policy you may call us at (212) 799 - 0631.

**Former Clients:** If you terminate your relationship with Ford Financial Solutions, LLC, we will continue to adhere to the policies and practices described in this notice.

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