

  
FISCHER & HUTCHINSON  
WEALTH ADVISORS

## Privacy Policy Statement

Fischer & Hutchinson Wealth Advisors, LLC privacy policy applies to consumers who are current or former clients. Throughout this policy, we refer to information that personally identifies you or your accounts as “personal information”.

- 1. We do not sell your personal information to anyone.**
  
- 2. We do not disclose personal information to third parties except under the circumstance wherein:**
  - We may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law, for example, to cooperate with regulators or law enforcement authorities, resolve client disputes, or perform credit/authentication checks.
  - We may share your information with other professional’s, such as estate attorneys, to help facilitate work being completed on your behalf, but only after you agree to this arrangement.
  
- 3. We do collect personal information in the normal course of business in order to administer your account(s) and serve you better.**
  - *Application and planning information.* We collect information that you provide to us when you open an account and/or when we form planning services for clients. The information we collect may include name, address, phone/fax number, email address, Social Security number, and information about your interests, investments, balance sheet, income statement, cash flow needs, estate plans, tax items and previous investment experience.
  - *Transactional Information.* Once you have an account with us, to administer your account and better serve you, we collect and maintain personal information about your transactions, including balances, positions, and history, and may include your name or other data in an internal client list that reflects your activities at Fischer & Hutchinson.
  - *Tax information.* We may collect tax information from you for the correct and accurate preparation of your tax return or to file amendments or tax extensions. Additionally, in the course of our tax planning, we may seek additional financial and tax information for the purpose of projecting your tax position in the future.

**4. We use your personal information to fulfill our regulatory obligations and to help us deliver the best possible service to you.**

**5. We protect the confidentiality and security of your personal information.**

- Fischer and Hutchinson Wealth Advisors LLC, does not sell or share any of its client or data base information with any outside or third party vendor.
- Fischer and Hutchinson Wealth Advisors LLC, restricts access to personal information to our employees and agents for business purposes only.

**6. We will continue to evaluate our efforts to protect personal information and make every effort to keep your personal information accurate, up-to-date and confidential.**

- If you identify any inaccuracy in your personal information, or you need to make a change to that information, please contact us so that we can update our records immediately.

**7. We will provide to you any notice of changes to this privacy policy.**

- If, at any time in the future, it is necessary to disclose any of your personal information in a way that is inconsistent with this policy, we will give you advance notice of the proposed change so that you will have the opportunity to opt out of such disclosure

If you have any questions or concerns about Fischer and Hutchinson Wealth Advisors Privacy Policy Statement, please contact us at 302-644-3540.