

Privacy Notice

Spartan Planning & Wealth Management considers client privacy to be a fundamental aspect of our client relationships. We are committed to maintaining the confidentiality, integrity, and security of our clients' personal information.

In the course of providing you with advisory services, we may collect, retain, and use client information for the purposes of administering our operations, providing client service (including through authorized professionals and third parties), and complying with legal and regulatory requirements.

This information may come from sources such as internal financial planning information gathering forms, investment policy statements, account applications, and other forms from other written, electronic or oral correspondence from your broker dealer, custodian, attorney, accountant or other advisor you may employ.

We do not sell, exchange or disclose client information with outside organizations unless the third party is essential in administering our operations or except as required or permitted by law. No confidential information, whatever the source, regarding any client, may be disclosed except the following: We reserve the right to disclose or report personal information where we believe in good faith that disclosure is required under law, or to cooperate with regulators or law enforcement authorities.

Our firm may disclose information about client or client's account to a non-affiliated third party with client's written request or permission or if it is important to our internal processes and execution of our advisory duties. Finally, to further safeguard client information digitally, we maintain password protected systems, antivirus and antispyware software as well as other protections for additional security.