THE LEGACY COUNCIL
INSURANCE PLANNING & ASSETS MANAGEMENT
Building & Preserving the Legacy of a Lifetime

Privacy and Confidentiality Policy

At The Legacy Council we are professionally and personally committed to maintaining client privacy and confidentiality. We safeguard all information entrusted to us by our clients and prospective clients.

The information exchanged in all meetings, dialogues, phone conversations and emails will remain private and confidential and used for the sole purpose of making the most beneficial recommendations for you, your retirement and/or the appropriate financial planning.

Should you agree to investigate any of the recommendations, products, or services The Legacy Council provides to you, the sum or part of the information you have shared with us may be made available to the provider of such products or services (with the sole purpose that the information is needed by that provider to provide you with such products or services).

No information sharing will occur without your knowledge and consent unless required by law. Your information will never be shared or exchanged for third party marketing purposes.

Advisor Signature____

Client Signature____

Client Signature____