

Privacy and Disclosure Policy

Financial Architects & Consultants, LLC recognizes the importance of protecting all information that you provide to us in the completion of this fact-finding questionnaire. To further this commitment, we have adopted this Privacy Policy to tell you how we collect, store, use and share personal information you provide to us.

Personal information is information that identifies you and can be used to contact you directly. We only collect personal information voluntarily given to us by you.

For example, this information may include:

1. Name
2. Personal contact information (residential address, phone number, email address)
3. Employment Information
4. Personal goals
5. Investment account information
6. Insurance and Annuity account information
7. Legal Documents (Wills, Trust, Directives)
8. Tax-related Documents

Additionally, we may also collect other types of information like your age or date of birth, gender, and occupation.

Whatever the purpose may be, we will only collect information to the extent reasonably necessary to create your desired LifeArcPlan™ financial survey. All information disclosed by you, and the reports generated pursuant to your disclosure of information to us, will be shared with your stated financial planner who referred you to Financial Architects & Consultants, LLC.

The security and confidentiality of your information is extremely important to us. That's why we have technical, administrative, and physical security measures in place to protect your personal information from unauthorized access and improper use. We also review our security procedures periodically to consider appropriate new technology and updated methods. But, despite our reasonable efforts, no security measure is ever perfect or impenetrable.