

PRIVACY POLICY

At Simply Balanced Solutions, LLC we value you (Client) and share your concerns about your privacy. This document describes our use and the protection of your nonpublic personal information (“Client’s Information”).

The Client agrees to allow Simply Balanced Solutions, LLC to use confidential information to:

- Maintain Simply Balanced Solutions, LLC business records
- Pay bills, audit and reconcile accounts and paperwork
- Prepare budgets, expenditures and other financial reports
- Perform other tasks as requested by Client

Simply Balanced Solutions, LLC agrees:

- Not to copy or otherwise reproduce any client's information without prior consent of the Client.
- Not to disclose client information to third parties other than those listed on the *Client Disclosure Authorization Form* including Client's family members and other professionals without direct permission from the Client or as required by law.
- Not to sell or give away client's information.
- To take reasonable steps to maintain precautionary procedures to keep Client information confidential. While we cannot guarantee such confidentiality against all possible risks, the steps we will take include:
 - Transporting documents in a separate and/or sealed file
 - Storing documents in a secure file cabinet
 - Shredding, destroying, or returning all documents when no longer needed to perform agreed upon services.
- In some cases, we must provide information to a party providing services to our customer or the customer’s account. In these cases, we would seek verbal or written permission from the customer before proceeding.
- To return any client information to the Client when the purposes of the Privacy Agreement have been fulfilled or the Agreement otherwise comes to an end.
- To abide by the terms of the Privacy Policy, even after the Agreement is terminated.
- To adhere to the American Association of Daily Money Managers Code of Ethics. (copy available upon request)
- Usernames and Passwords:
 - Not to ever maintain record of Client’s passwords.
 - This information may/will only be used with the Client for the sole purpose to perform agreed upon services and for the one-time use.
 - Not to ever ask for your personal financial information or passwords over the phone. Never give this information to someone on the phone.

CLIENT DISCLOSURE AUTHORIZATION FORM



Client Name: _____ Date: _____

I authorize the disclosure of my financial information only in a specific manner, for named reasons, and to specific individuals described below.

Name of Authorized Person:

Description of Information:
Reason for requested information:

Name of Authorized Person:

Description of Information:
Reason for requested information:

Name of Authorized Person:

Description of Information:
Reason for requested information:

Name of Authorized Person:

Description of Information:
Reason for requested information:

Name of Authorized Person:

Description of Information:
Reason for requested information:

I have read and accepted the terms of the Simply Balanced Solutions, LLC Privacy Policy.

Printed Name: _____

Signature: _____ Date: _____