

Vital Signs Financial Services LLC Privacy Policy

Vital Signs Financial Services LLC is committed to protecting the confidentiality, integrity and safety of the non-public personal information provided to us by our clients. The categories of non-private information that Vital Signs Financial Services LLC collects from you may include information about your personal finances, information about your health to the extent it is needed for the financial planning process, information about transactions between you and the third parties, and information from consumer reporting agencies, such as credit reports. Vital Signs Financial Services LLC uses this information to help you meet your financial planning goals.

Vital Signs Financial Services LLC does not provide your personal information to mailing list vendors or solicitors. Federal and state regulators may review our company records and your personal records as permitted under law. Vital Signs Financial Services LLC stores your information electronically in a secure format to insure that is not subject to unreasonable risk and all physical storage media is secured in a fire proof safe.

Vital Signs Financial Services LLC will retain your information for the time required under law and the Code of Ethics and Professional Responsibility adopted by the Certified Financial Planner Board of Standards. This will include the time that you are a client with us and for the required time that this information must be retained in accordance with federal and state securities laws. If you decide to sever your relationship with us, we will continue to adhere to these privacy standards.

Vital Signs Financial Services LLC may, as needed, disclose certain information to attorneys, accountants, or other financial professionals solely to obtain a second opinion about a specific question you may have or a technical issue upon which it is professionally and ethically incumbent upon Vital Signs Financial Services LLC to obtain an opinion or explanation from a professional, who is more expert in that field than the owner or an employee of Vital Signs Financial Services LLC.

Vital Signs Financial Services LLC will notify you if this privacy policy is expected to materially change. You will be offered a copy of our privacy policy at the initial meeting between you and Vital Signs Financial Services LLC.