

Ferguson Financial Planning



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Privacy Policy Updated February 17, 2025

Our Promise to You

As a client of Ferguson Financial Planning, you share both personal and financial information with us. Your privacy is important to us, and we are dedicated to safeguarding your personal and financial information.

Information Provided by Clients

In the normal course of doing business, we typically obtain the following non-public personal information about our clients:

- Personal information regarding our clients' identity such as name, address and social security number;
- Information regarding securities transactions effected by us; and
- Client financial information such as net-worth, assets, income, bank account information and account balances.

How We Manage and Protect Your Personal Information

We do not sell any information about current or former clients to third parties. We will not share nonpublic personal information about clients or consumers with third parties, except as noted below. Specifically, Ferguson Financial Planning may share personal information as necessary:

- To complete transactions or account changes as directed by the client;
- To maintain or service a client's account;
- If requested or authorized to do so by a client;
- With contracted service providers providing administrative functions for Ferguson Financial Planning; and
- If required or permitted by law or regulatory authorities with jurisdiction over the firm to do so.

We maintain physical, electronic and procedural safeguards to protect our clients' personal information. Our Privacy Policy restricts the use of client information and requires that it be held in strict confidence.

Client Notifications

As required by federal law, we will notify clients of our privacy policy at least annually while they continue as a client. We reserve the right to modify this policy at any time, but rest assured that if we do change it, we will notify each client promptly.