11/18/2014

Privacy Policy Statement

What is our Commitment to You?

Dodds Wealth Management Group is committed to maintaining the trust and confidence of our clients. We want you to understand how we protect your privacy when we collect and use information about you, and the measures we take to safeguard that information. Keeping client information secure and private is a priority for us. The following describes our Privacy Policy. Please take a moment to review it and feel free to contact us with any questions.

What types of non-public personal information do we collect about you?

In the course of providing service to you, we collect non-public personal information about you from the following sources:

- Information from you on product or service applications and other standard forms (such as name, address, social security number, assets, investments, transactions, income, etc.);
- Information obtained from financial institutions, statements, tax returns, etc. (such as account balance, payment history, parties to transactions, transactions, etc.);
- Information we receive from consumer reporting agencies (such as credit history, etc.);
- Information obtained when verifying the information you provide on applications or other forms (such as information from current or past employers, financial institutions, etc.)

How do we protect the confidentiality and security of your non-public personal information?

Keeping your information secure is one of our most important responsibilities. We restrict access to non-public personal information about you to those employees and agents who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information.

Do we disclose to any affiliated or non-affiliated third parties your non-public personal information?

We do not sell, share, or disclose your non-public personal information to non-affiliated third party marketing companies. We may however disclose non-public personal information to third parties about you under certain circumstances as permitted or required by law, such as to conduct business on your behalf.

What is our policy relating to former clients?

Our current policies, which are subject to changes, apply to both current and former clients.

If you have any questions after reading this Privacy Policy, please contact us by writing to:
Dodds Wealth Management Group, 385 Inverness Parkway, Suite 105, Englewood, CO 80112