



Our Privacy Policy

“Leading Edge Financial Planning, LLC will never disclose any investor’s personal information or financial data to any third party unless specifically instructed to do so by the investor or in cases where we are required by law.”

What This Means To You

We do not sell your confidential information to anyone. The investment and planning services we provide and the manner in which we are compensated are structured to align our interest with yours. While selling client information is a widespread legal practice, it is not consistent with our practice’s values.

We do not share your confidential information with third parties without your permission or in cases where we are required by law. Third parties as described here are any parties not integrated into our business operations. We insist that every Leading Edge Financial Planning, LLC employee adhere to the highest standards of personal character and integrity. We maintain internal control procedures that ensure your personal information is used only for its intended business purpose.

We protect your confidential information. We recognize that the success of our business depends upon our ability to maintain your trust and confidence. The protection of personal information is the foundation of this trust. Our security measures comply with and often exceed federal and state requirements as well as industry practices. We continually review these security measures and take steps to strengthen them in response to changing environmental conditions and technological advances.

Leading Edge Financial Planning, LLC takes pride in never compromising our ethical business standards and we hope that you value the measures we employ to maintain that integrity. If you have any questions regarding our privacy policy, or any other matter of importance to you, please contact us at your convenience.

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