

PRIVACY POLICY FOR ASSET PLANNERS, INC. DOING BUSINESS AS CONSOLIDATED WEALTH MANAGEMENT

At **Asset Planners Inc.** (DBA Consolidated Wealth Management) we respect your personal financial privacy. We realize that you have entrusted us with private personal financial information, and it is important to us that you know our policy concerning what we do with that information. These policies apply to our current and former customers.

We collect personal financial information about you from the following sources:

- Information you provide us in investment advisory agreements, brokerage account applications, and other documents you complete in connection with the opening and maintenance of your accounts with us; and
- Information you provide us orally; and
- Information we receive from third parties, such as brokerage firms, about your transactions with us or with others.

This personal information includes such things as your name, Social Security number, address and telephone numbers, net worth, annual income and account numbers.

We do not disclose any nonpublic personal financial information about you to any nonaffiliated third parties, except in the following circumstances:

- When required to execute transactions for your account or otherwise to provide services you have requested; or
- When you have specifically authorized us to do so in writing; or
- When permitted or required by law.

Within our firm, we restrict access to your personal financial information to the employees who need to know that information to provide services to you. To ensure security and confidentiality, we maintain physical, electronic, and procedural safeguards to protect your privacy including off-site backups of our computer information in a secure environment; anti-virus protection software; and password protected access to customer information.

These policies apply to both current and previous customers of **Consolidated Wealth Management** in its role as a registered investment advisory firm. Information about our customers may be shared with its regulators, its broker/dealer (if applicable), the CFP Board of Standards (if applicable), and the Financial Planning Association (if applicable and only in conjunction with a possible Code of Ethics violation).

For additional information, please feel free to contact Compliance.

Consolidated Wealth Management

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