



Fee-Only Financial Planning
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Privacy Policy

Lighthouse Wealth Management, Inc. (“Lighthouse”) is committed to maintaining the confidentiality, integrity and security of your personal information. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We maintain physical, electronic, and procedural safeguards to protect your information.

We may collect nonpublic personal information about you from the following sources:

- Information we receive during the financial planning process, including information on your tax returns and account applications.
- Information about your transactions with us, our affiliates, and others, and
- Information we receive from outside agencies such as banks and brokerage houses.

We are required to keep all information about our engagement confidential. Therefore, we will not disclose any information about you unless we have your approval or are required/permitted by law. This applies even if you are no longer a client.

We do not provide your personal information to mailing list vendors or solicitors.

We are committed to the safekeeping of your confidential information and we maintain physical, electronic, and procedural safeguards to protect your information.