

Heirmark Statement of Privacy Principles



This Statement of Privacy Principles describes the policies and procedures of Heirmark for the collection, use and dissemination of personally identifiable information about our clients.

At Heirmark, we take our client relationships very seriously. Collecting private and confidential information, both personal and business, allows our firm to provide comprehensive planning advice, which takes into consideration overall goals and objectives.

Heirmark requests personal and private information only if we believe the information is relevant to our client relationship, and it will assist our firm in providing the best planning advice.

Heirmark uses personally identifiable information only in a manner consistent with our Privacy Principles and in accordance with The Health Insurance Portability and Accountability Act (HIPAA). This information is only made available to appropriate personnel who have a business reason for accessing, reviewing, and analyzing it. All personnel at Heirmark take appropriate measures to ensure compliance with these privacy principles.

Heirmark will not disclose your information to any outside party without your direct, written consent.

Heirmark uses reasonable administrative, technical, personnel and physical measures to safeguard personal and confidential information in its possession against loss, theft and unauthorized use, disclosure or modification.

This agreement is acknowledged by both Heirmark and the Client(s) as signed below.

Client Signature

Date

Client Signature

Date

Representative, Heirmark

Date