

Privacy Policy

Tiner Financial Services has adopted a strict privacy policy designed to protect client confidential information. Specifically, the firm:

- Collects no more information than necessary to provide services agreed upon with the client. This information may include sources and amounts of income, expenses, assets, liabilities, financial account statements, tax returns, business records, medical information necessary for planning, and details such as name, address, telephone number, email address, date of birth, and social security number.
- Does not disclose any confidential personal information about current, former or prospective clients to anyone, except as required by law or in response to inquiries by governmental authorities, or as specifically directed by the client. For example, if a lawyer or CPA is in a position to provide necessary financial information, the firm would not contact such a third party without first obtaining your permission.
- Restricts access to confidential personal information about you to Owner/Principal Susan D. Tiner.
- Maintains physical, electronic, and procedural safeguards to comply with federal standards to guard your personal information.
- Maintains client confidential information during the course of the engagement and thereafter for the time that such records are required to be maintained by federal and state securities laws. Such records are destroyed after that period of time.
- Provides a copy of its Privacy Policy at the time services are initially engaged and annually thereafter.
- Notifies clients of changes in its Privacy Policy so that clients will have the opportunity to opt out of any such changes before they become effective.

For questions regarding this privacy policy, please contact Susan D. Tiner in writing at Tiner Financial Services, 768 Edgewood Rd, San Francisco, CA 94121.