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The comments compiled on our website are general in nature and are not tailored to any particular situation. As in the case with any estate, tax or financial planning recommendation, the planning tips suggested here should not be implemented without carefully considering the total economic impact and obtaining the advice of counsel. The advice of an attorney, accountant, or other financial planning professional will provide valuable aid in analyzing the suitability of the particular estate, tax, or financial planning tip for you. By providing this information, The Blum Firm P.C. does not assume any obligation to provide notification of future changes in laws. Please contact us if the information we have provided affects you and you would like to discuss.

## Privacy Notice

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Specifically, you need to be informed in regard to the following:

1. We collect nonpublic personal information about you as follows:
  - a. Information we receive from the estate planning questionnaire, insurance applications, tax returns, or other forms (*e.g.* date of birth, Social Security number, personal and business assets and liabilities, information regarding family relationships, etc.).
  - b. Information we are told by you, your family members, your CPA, banker, broker or insurance agent.
2. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted by law.
3. We restrict access to nonpublic personal information about you to those who need to know that information to provide services to you. We maintain physical, electronic and procedural safeguards to protect your nonpublic personal information.

You have trusted us with your personal information in order for us to provide certain legal services to you, and you have the right to feel confident that we are being responsible in the management and safeguarding of that information. If you have any questions in regard to our privacy policy, please feel free to contact us at (817) 334-0066.

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