

## **O'Brien Wealth Partners LLC Privacy Statement**

O'Brien Wealth Partners LLC, an independent registered investment advisor, is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to it. All personal information provided to our firm in connection with any services we provide is held in the strictest confidence. We do not disclose information to nonaffiliated third parties, except as permitted by law, and do not anticipate doing so in the future. The specific elements of our privacy policy with respect to client information are listed below.

- ❑ We limit access to information to those employees who have a business or professional reason for knowing, and to nonaffiliated third parties as permitted by law. (For example, federal regulations permit us to share a limited amount of information about clients with a brokerage firm in order to execute securities transactions on behalf of clients, or so that our firm, with the client's consent, can discuss their financial situation with their accountant or lawyer.)
- ❑ We maintain a secure office and computer environment to ensure that client information is not placed at unreasonable risk. During normal business hours, our office entrance is continuously in view of employees. Outside of normal business hours, our doors and files are locked. Documents with personal information that are no longer needed are shredded. We use a firewall barrier to prevent unauthorized access to our computer systems from the Internet, on which we routinely perform proactive security tests.
- ❑ The categories of nonpublic personal information that we collect from a client depend upon the scope of the client engagement. They will include information about personal finances, account numbers, background, age and information about transactions between clients and third parties.
- ❑ We require strict confidentiality in our agreements with nonaffiliated third parties that require access to clients' personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our company records and the personal records of clients as permitted by law.
- ❑ We do not maintain or possess consumer report information or any compilation of consumer report information derived from consumer reports. We do not provide personally identifiable information about clients to mailing list vendors or solicitors for any purpose.
- ❑ We will notify clients in advance if our privacy policy is expected to change. We are required by law to deliver this Privacy Statement annually in writing.