

Privacy Policy

Collecting Information

603 Financial, Inc. dba Arrivity Financial Planning (“Arrivity”) collects information about you to help us serve your financial needs, to provide customer service, and to fulfill legal and regulatory requirements, at both the state and federal level. Any personal information collected is used to support these normal business operations and to service your account.

Arrivity collects non-public, personal financial and health information about you from information we receive from you. The sources and the information collected may include:

- Information included on applications and related forms such as your name, address, Social Security number, assets, and income.
- Information regarding your transactions with us, like services purchased, account balances and payment history.
- Information from consumer reporting agencies such as credit relationships.
- Information from your employer, financial custodian, or benefit plan sponsor such as name, address, Social Security number, assets, and income.

Sharing Information

Arrivity does not disclose non-public personal information about you, including your engagement as a client, to anyone. However, while servicing your account, and only with your written direction, we may share information described above with other unaffiliated providers such as insurance companies and brokers, mutual fund companies, banks, securities brokers or investment firms. This will only occur if we agree in advance that their assistance is helpful for implementing your financial plan. We may also disclose your information to other organizations such as government agencies and law enforcement officials, e.g., for tax reporting under court order, or other organizations and individuals, e.g., attorney or tax professional, with your consent.

Protecting your information

Arrivity maintains physical, electronic, and procedural safeguards to protect your non-public personal information to be sure we are complying with our own policy, industry practices and federal or state regulations. If you decide to become an inactive client, we will continue to adhere to this privacy policy and the practices described herein.