

Robert Joseph Noe d/b/a Noe Investment Planning and Management

Client Privacy Policy

Noe Investment Planning and Management does not disclose any non-public client information to any third party unless authorized by the client or unless required by law.

Examples of non-public information:

- Custodian account numbers, passwords, login IDs
- Clients' financial information such as income, net worth, debt, etc.
- Clients' specific investment information such as holdings, total market values, gains or losses, etc.
- Clients' brokerage reports, tax forms, notes or letters
- Clients' investment reports produced by Noe Investment Planning and Management

No client information is made available to any third party for the purpose of solicitation.

All documents containing non-public client information are physically stored onsite in a locked file cabinet.