

Privacy Policy



Comprehensive
Wealth Counsel

Personal Information

As a Dale K. Ehrhart, Inc. (“DKE” or “DKE Comprehensive Wealth Counsel”) client, your personal non-public information is treated with the utmost care and confidentiality. Any discarded personal information is destroyed to protect your identity and to keep your privacy. Sensitive information is only available to DKE employees and network security experts, and any authorized third parties (account custodians, your advisor). Any information exchanged electronically will not contain full account numbers and/or names of clients and is conveyed via SSL encryption or secure document sender such as Outlook Mail Encryption, or Sharepoint. Other systems that may contain sensitive information include Microsoft365, Microsoft Azure, Smarsh, Black Diamond Performance Reporting, Vector Reporting, Facebook, LinkedIn, Intuit Quickbooks, eMoney, Charles Schwab & Co., Inc., Fidelity Investments, and my529. Such information may include:

- Name and address, including email address
- Social Security or taxpayer identification number
- Assets
- Account balance
- Investment activity

Personal non-public information will be stored in a secured area. Use of electronic information is stored on firewall secured dedicated servers. This information is only made available to DKE employees and authorized third party partners. We require third party partners having access to your non-public personal information to treat it with the same high degree of confidentiality maintained by DKE.