

Privacy Policy for Resolute Planning Sdn Bhd

Last Updated: 8th December 2023

Resolute Planning Sdn Bhd ("RPSB", "we," "our," or "us") is committed to protecting the privacy of our clients and users of our financial planning services. This privacy policy outlines how we collect, use, and safeguard your personal information.

Information We Collect:

We may collect the following types of personal information:

- **Contact Information:** Names, addresses, phone numbers, email addresses, and other similar information.
- **Financial Information:** Income, assets, liabilities, expenses, investment preferences, and other financial details.
- **Identification Information:** Social Security numbers, tax identification numbers, and other government-issued identification information.
- **Employment Information:** Occupation, employer details, and related information.
- **Transaction Information:** Details about your financial transactions with us or third parties.

How We Collect Information:

We collect information directly from you when you provide information during consultations, meetings, or through our online platforms or any other third-party service providers, financial institutions, or other sources with your consent.

How We Use Your Information:

We may use your information for the following purposes:

- **Financial Planning Services:** To provide personalized financial planning and advice.
- **Communication:** To communicate with you about our services, updates, and relevant financial information.
- **Compliance:** To comply with legal and regulatory requirements.
- **Security:** To protect against fraud, unauthorized access, or other unlawful activities.

Information Sharing:

We do not sell or rent your personal information. We may share your information with

- **Service Providers:** Third-party service providers who assist us in delivering our services.
- **Legal Obligations:** When required by law or to protect our rights and interests.

Security Measures:

We take reasonable steps to safeguard your personal information from unauthorized access and disclosure.

Your Choices:

You have the right to:

- Access and Correct: Review and correct your personal information.
- Withdraw Consent: Withdraw consent for specific uses of your information.
- Delete: Request the deletion of your personal information, subject to legal and contractual restrictions.

Changes to this Privacy Policy:

We may update this privacy policy from time to time. The latest version will be posted on our website with the effective date.

Contact Us:

If you have any questions or concerns about this privacy policy, please contact us at rpsb@resolute-planning.com