



Napa Valley Estate Planning Privacy Policy & Communication Terms

Effective Date: March 31, 2026

1. Information We Collect

We may collect personal information when you:

- Submit a form on our website
- Contact us by email or phone
- Schedule an appointment
- Subscribe to our newsletter
- Communicate with us via SMS
- Become a client

The information we may collect includes:

- Name
- Email address
- Phone number
- Mailing address
- Information you provide in contact forms or emails
- Appointment and communication records
- SMS message content and metadata
- Website usage data (cookies, analytics)

2. How We Use Your Information

We use collected information for the following purposes:

- Responding to inquiries
- Scheduling appointments
- Providing legal services
- Sending appointment reminders
- Sending document updates
- Billing and administrative communications
- Sending newsletters or educational information (if you opt in)
- Improving our website and services
- Maintaining internal records
- Complying with legal obligations

We do not sell or rent your personal information to third parties.

3. Email Communications

If you provide your email address to Napa Valley Estate Planning, we may send communications related to:

- Your legal matter
- Appointment confirmations and reminders
- Document updates
- Billing notifications
- Newsletters or educational information related to estate planning (if you opt in)

You may opt out of non-essential email communications at any time by using the unsubscribe link in the email or by contacting our office.

4. SMS Communications

If you consent to receive SMS messages from Napa Valley Estate Planning, we may send text messages related to:

- Appointment reminders
- Document updates
- Scheduling follow-ups
- Billing notifications

You may opt out of SMS messages at any time by replying STOP.

5. Cookies and Website Analytics

Our website may use cookies or analytics tools to collect anonymous usage data such as:

- Browser type
- Pages visited
- Time spent on the website
- Referring websites

This information is used to improve website functionality and user experience and does not personally identify individual users.

6. Third-Party Services

We may use third-party service providers to operate our website and communications, including website hosting providers, email service providers, SMS messaging providers, cloud hosting services, client management software, and analytics services. These providers are only given the information necessary to perform their services and are required to protect your information.

7. Disclosure of Information

We do not sell, rent, or trade your personal information. We may disclose personal information only if required by law, court order, subpoena, or necessary to protect our legal rights or safety.

8. Data Security

We implement reasonable administrative, technical, and physical security measures to protect your personal information from unauthorized access, disclosure, alteration, or destruction.

9. Data Retention

We retain personal information only as long as necessary to provide legal services, maintain records, comply with legal obligations, resolve disputes, and enforce agreements.

10. Your Privacy Rights (California Residents)

California residents may request access to personal information we collect, request deletion of personal information (subject to legal retention requirements), request information about how data is used, and request correction of inaccurate information.

11. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. Any changes will be effective immediately upon posting the revised policy on our website.

12. Contact Information

Napa Valley Estate Planning

Email: support@napavalleyestateplanning.com

Phone: (707) 227-5853

Website: napavalleyestateplanning.com