

PRIVACY POLICY

We, my associates and I do not disclose any non-public information we may collect from you or from third parties as part of our service. Non-public information includes personal items such as names, address, and social security numbers. It also includes tax returns or other financial information provided or that I obtain from with your authorization. Permitted disclosures include information to my employees or associates with whom I supervise and which are involved in providing services to you. I am precluded by law from selling or disclosing client names or lists in my possession. Internal Revenue Service (IRS), code 7216 restricts my ability to release your non-public information to third parties without your written consent to me in a prescribed form (which I will provide to you). Failure to comply with this law could result in a cash fine to me up to \$1,000 or one year in jail or both.

PARTIES TO WHOM I DISCLOSE INFORMATION

Tax professionals, including CPAs are not afforded the same “client-confidentially” privileges enjoyed by attorneys. Accordingly, when presented with a court subpoena or a request from the IRS or state government, I am required by law to provide that agency with your personal tax or financial information without your permission. Therefore, any written documents and oral information you provide in connection with the preparation of your tax returns is available to the taxing authorities. Failure to do so would make me subject to cash penalties or possible jail time.

RECORD RETENTION

My service to you requires that I obtain documents (such as IRS forms W-2, 1099's etc) and other information needed to prepare an accurate tax return. I am required by law to keep this information in my possession for a three year period starting with the current year. Thereafter, I will retain your information depending on your client status:

Current and on-going clients: Income tax, payroll, and other tax or financial documents kept for a ten-year period.

Non-current clients: Information kept for a three-year period subsequent to the termination date.

PROTECTING YOUR CONFIDENTIALITY AND SECURITY

As your tax preparer and provider, I am responsible to take all reasonable necessary steps available to protect information you provide. Procedures include but are not limited to:

- Employee and staff training in privacy issues
- Use of user names and passwords to protect electronic communications
- Secure storage of all written documents.