

YOUR PRIVACY IS IMPORTANT TO US

We highly value your trust and confidence in us and want to assure you that your personal information is kept completely confidential by us. As a Certified Public Accounting firm, we adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of your information.

TYPES OF PERSONAL INFORMATION WE COLLECT

In order to meet your needs in the course of tax, accounting and payroll services; we collect certain personal information about you and/or your business – but only when that information is provided by you or is obtained by us with your authorization. We use that information to deliver services and to propose on additional services at your request. Examples of the sources from which we collect information include:

- interviews and phone calls with you,
- letters or e-mails from you,
- tax return or financial planning organizers,
- financial history questionnaires, and
- Business financial statements

PROTECTING THE CONFIDENTIALITY AND SECURITY OF YOUR PERSONAL INFORMATION

Keeping your information confidential and secure is of utmost importance to us. We maintain physical, electronic, and procedural safeguards to guard your personal information. In doing so, we restrict access to your personal information to those employees who need to know that information to provide services to you and to the aforementioned support service companies. Those companies are, in turn, legally and contractually bound to maintain the privacy of any information shared with them. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. Should your status become inactive or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

PARTIES TO WHOM WE DISCLOSE INFORMATION

As a rule, we do not disclose personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

- To comply with a validly issued and enforceable subpoena or summons.
- In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.
- As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.
- To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if

we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures would be engaging a records-retention agency to store prior year records.)

OUR PLEDGE TO YOU

Our professional ethical obligations and responsibilities demand the highest regard and duty toward the confidentiality of your personal information and security of your privacy. We will protect your personal information, use it appropriately, and accomplish our engagements with you in such manner as to always maintain your trust and confidence.