

## **Our Privacy Policy**

We value your trust and confidence and we want to assure you your personal information is kept completely confidential by us. As Certified Public Accountants, we adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of all client information.

### **What Personal Information Do We Collect?**

In order to meet your needs in the course of tax return preparation, tax and financial planning, and tax compliance engagements for you, we collect various types of personal information about you from the following sources:

- Information we receive from you in person, by the phone, mail or e-mail, through our website, on tax preparation worksheets, and on other documents or forms we use in preparing your tax return or providing other services for you. Such information includes, for instance, your name, address, social security number, income, investment and other assets, and other tax and financial information about you;
- Information we receive from others about your transactions or relationships with them. Such information includes, for instance, investment, loan or banking activity, balances or account numbers, legal agreements and documents, and other information we gather in the course of providing services to you.
- Information we receive from you when your browser interacts with our website. This could include information transmitted on an internet "cookie," such as your password to our site, your preferences on the site, and your internet service provider's address.
- Information we receive from a consumer reporting agency, such as your credit history and outstanding loan balances.

### **Is Personal Information Shared with Others?**

We do not share any personal information about you with anyone without your express consent, except as permitted by law and as described below.

The law permits or requires disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, or as part of actual or threatened legal proceedings or alternate dispute resolution.

We may share any information we collect (except for consumer reporting agency information, which we do not disclose) to nonaffiliated companies which perform support services on our behalf (such as tax or data processing, transmission of electronic returns or data, records retention, and mailing services). We do not sell or otherwise disclose our client list or any of your information to outside companies for their marketing or solicitation use.

We may also share your information with other parties who help assure our compliance with professional accounting standards (such as peer review), or who conduct due diligence procedures, such as if we consider a sale or merger of our practice.