



PRIVACY POLICY

CONFIDENTIALITY

You may have some concern about the confidentiality of the information you provide to this office. It is our policy to keep your personal and business matters confidential to the extent permitted by law.

PRIVACY POLICIES

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies.

THIS FIRM'S POLICY

All information you provide to this firm is handled with the utmost confidentiality. Your personal information will only be shared with members of our firm who need to know this information in order to complete the work you have hired our firm to do. Other than the IRS permitted disclosure to a tax return processor for the purpose of preparing and e-filing your tax return, this firm will not disclose your personal information to anyone outside our firm without your express written permission to do so, or unless the firm is legally required or permitted to do so. For example, if a mortgage lender contacts this office for a copy of your return or information about it, you will be required to provide written consent to disclose your tax return information prior to this firm responding to that request.

CLIENT PRIVILEGED COMMUNICATIONS

You should also be aware that anything you tell this firm during the interview for the preparation of your tax return is confidential, but not protected from the IRS. Privileged communications (those that are protected from IRS authority to compel the firm's testimony) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although this firm considers any information you provide us as confidential, return preparation engagements are not covered by advisor-client privilege.

If you feel the nature of any subject matter to be discussed requires protected communications, please raise that issue so that we can discuss your possible need to consult with an attorney for legal advice.

REFERRALS ARE WELCOME

Referrals are the cornerstone of any service business. This firm, like other professional service firms, relies on satisfied clients as the primary source of new business. Your referrals are both welcome and most sincerely appreciated! Since your referrals are generally individuals you are well acquainted with, you can be assured that your personal, financial and tax data will not be shared with them.

AN EXPRESSION OF CONFIDENCE

When you refer clients here, you are expressing your faith and confidence in the services this office has and will continue to provide to you. You may have business associates who need professional tax assistance or family and friends who struggle to do their own taxes every year. No matter whom you refer, be assured that their individual tax needs will be looked after in the same professional manner yours have been. Thank you for allowing this firm to be of service.