

## PRIVACY POLICY

We value you as our client, and your privacy is important to us.

Please read our privacy policy below.

We collect nonpublic personal information about you from various sources, including the following:

We collect nonpublic personal information about you from the following sources:

- ❖ Information we receive from interviews regarding your tax situation;
- ❖ Information we receive on applications, organizers, or by other means, such as your name, address, telephone number, social security number, dependents, income, and other tax-related data; and
- ❖ Information about your transactions with us or others; and
- ❖ Information from tax-related documents you provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV and stock transactions, etc.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to nonpublic personal information concerning you, except to employees who need access to such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you have any questions about our privacy policy, please contact us.