

Privacy



Policy

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.

Client Information, Privacy Policies and Notice Regarding Advisor-Client Privileged Communications

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

We handle all information you provide us 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. We will not disclose your personal information to anyone outside our firm without your express written permission to do so, or unless we are legally required to do so. For example, if a mortgage lender contacts our office for a copy of your return or information about it, we will ask that you provide written permission prior to our responding to that request.

You should also be aware that anything you tell us 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 our testimony) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although we consider 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 you have been.

Thank you for allowing this firm to be of service.