



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. 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. While this policy is specifically directed to individuals who inquire about or to whom we provide services for personal or family purposes, we adhere to similar confidentiality standards for our business clients under strict ethical responsibilities mandated by our membership in the American Institute of Certified Public Accountants. This Privacy Policy summarizes what information we collect about you, the limited times when we may share it with others, and how we protect your privacy.

TYPES OF PERSONAL INFORMATION WE COLLECT

In order to meet your needs in the course of tax preparation, tax and financial planning, and tax compliance engagements, we collect various types of personal information about you from the following sources: Information that we receive from you when we meet with you in person or over the telephone, when you send us information by mail or email, on tax preparation worksheets or other documents used in preparing your tax returns or in providing other services to you. Such information may include, for instance, your name, address, birth date, social security number, income and investment sources and amounts, and other tax and financial attributes about you.

Information about your transactions with us, our affiliates, or others. Such information may include, for instance, investment allocations and performance, investment objectives, parties to transactions, account balances, and payment history.

PARTIES TO WHOM WE DISCLOSE INFORMATION

We may share personal information with our affiliates to assist in our contact with you and to aid in providing tax, accounting and related planning solutions and opportunities to you. We do not share personal information with unaffiliated third parties without your express consent, except as permitted by law and as described below. The law permits disclosure in certain circumstances, such as if we must share information to protect against fraud or to protect against credit risk, in response to a court subpoena, and sharing with others who may be assisting us in compliance with professional standards or who assist us in providing tax preparation and other services to you.

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. 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.