

# OUR PRIVACY POLICY

## YOUR INFORMATION

Your non-public personal information is collected from various sources:

- Information received from you on tax organizers, worksheets, client questionnaires, applications and other financial documentation you provide;
- Information you provide via personal interviews telephone conversations, faxes and e-mails;
- Information about your transactions with the firm;
- Information received about you from consumer reporting agencies if background or credit checks are conducted on your behalf.

## NON-DISCLOSURE

Your non-public personal information is not disclosed to any person or party, except as required by law, to facilitate filing your tax return, or to prepare financial statements.

Upon closing your account, your non-public personal information will not be disclosed to any person or party unless required by law.

## SECURITY

Access to your information is restricted in a variety of ways:

- Only to those employees who have a need to know in order to provide products or services to you;
- Physical security, electronic security safeguards and strict procedural measures consistent with federal standards are in place to protect your non-public personal information.

Your privacy is important. Please trust that protecting your information is equally important.

Please call if you have any questions.