



Excellence in practice.

## Our Promise to You

At our firm, protecting your personal and tax information is not just good business, it's the law.

When you choose us to prepare your tax return, you're trusting us with sensitive details about your life, your finances and your future. We take that trust seriously. Federal law (Internal Revenue Code §7216) prohibits us from disclosing or using your tax return information for any reason other than preparing and filing your return, unless you give us clear, written permission to do so.

### How we use and protect your information

Federal law prohibits us from disclosing or using your tax return information for any purpose other than preparing and filing your tax return, unless you give us clear, written permission.

### Here's what that means for you:

- We will never share your information with third parties, such as mortgage lenders, financial advisors or software vendors, without your express, written consent.
- If you allow us to share information for a specific purpose, we'll give you a consent form that spells out exactly what's being shared, with whom and why.
- If you don't want to sign that form, that's entirely your choice. Your tax return will still be prepared. Refusing consent will never affect the quality of service you receive.
- If you change your mind later, you can revoke your consent in writing at any time.

We are also committed to strong security practices. In line with federal data protection standards, we store your information using secure systems and clear protocols, limiting access to staff who need it to do their work. Whether your return is prepared in our office or securely online, your privacy is protected by both policy and technology.

**If you ever have questions about how your information is handled, we encourage you to ask.** We'll walk you through exactly what we do, and what we don't do, with your tax information. Furthermore, if you ever believe your information has been shared improperly, you have the right to report it to the Treasury Inspector General for Tax Administration (TIGTA).

Your tax return is personal. Protecting it is our job, and we take that responsibility seriously. We are required by federal law to safeguard your information, limit how it's used and obtain your written consent before sharing it. That's not just our policy; it's your legal protection.