Privacy Policy

Enrolled Agents, {EAs} like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information.

Your privacy is important to us and we are required by law to comply with specific data-sharing regulations. Please read the following privacy policy before moving forward.

We collect nonpublic personal information (NPI) about you and your household or business from various sources, including:

- Interviews regarding your tax situation.
- Organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data.
- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions.
- Electronic tools and applications used to collect, store, reconcile and compile such information.
- Any other documents you provide to us to assist in the preparation of your tax return.

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

We restrict access to personal information concerning you, except to our employees who need 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 personal information.

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Please contact us with any questions, because your privacy, our professional ethics, and the ability to provide you with quality professional services are very important to us.