

Privacy Policy

This Privacy Policy is to help you understand what information we collect about you, the limited times we may share it with others, and what measures we take to protect your privacy.

It has always been the policy of **Affordable Tax Service** to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you.

What Personal Information Do We Collect?

In order to meet your needs in the course of tax return preparation, tax and financial planning, and tax compliance engagements for you, we collect various types of personal information about you from the following sources.

- Information we receive from you in person, by the phone, mail or e-mail, on tax preparation worksheets, and on other documents or forms we use in preparing your tax return or providing other services for you. Such information includes, for instance, your name, address, Social Security number, income, investment and other assets, and other tax and financial information about you.
- Information we receive from others about your transaction or relationships with them. Such information includes, for instance, investment, loan or banking activity, balances or account numbers, legal agreements and documents, and other information we gather in the course of providing services to you.

Is Personal Information Shared with Others?

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required or approved by you in writing as listed below:

- Requirements to comply with Federal, state or local law,
- Requirements to comply with National, State or local licensing rules,
- Requirements to disclose information in response to legal subpoenas,
- Items you permit or request us to disclose, as authorized by you in writing,
- Information, which you authorize us to disclose by signing our engagement letter, to electronically file your tax return, when applicable,
- Information, which you authorize us to disclose by signing our engagement letter, that discloses that you are our client, without disclosure of financial or other personal information.

How Do We Protect the Confidentiality and Security of Your Personal Information?

Keeping your information confidential and secure is of utmost importance to us. We follow standard industry practices to actively protect the confidentiality, security, and integrity of your personal information. We also maintain physical, electronic, and procedural safeguards to guard your personal information. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. And we take appropriate precautions such as confidentiality agreements before sharing your information with any outside parties.

Should you become an inactive client or should our relationship end, we will continue to protect the confidentiality and security of your personal information with any outside parties.

Our Pledge to You

Our professional ethical obligations and responsibilities have always demanded no less than the highest regard and duties for the confidentiality of your personal information and the security of your privacy. We will protect your personal information, use it only as necessary, and perform our engagements so as to always maintain your trust and confidence in us.

Thank you for allowing us to be of service, we truly value our relationship with you. We hope you view our firm as your most trusted advisor, and we will work to continue earning that trust. Please call us anytime you have questions or we may be of further service.