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Firm's Privacy Policy

Tax professionals, like all providers of personal financial services, are required by law to inform their clients of their policies regarding privacy of client information. My firm has been and continues to be bound by professional standards of confidentiality that are more stringent than those required by law. Therefore, my firm has always protected your right to privacy.

Types of Nonpublic Personal Information My Firm Collects

My firm collects nonpublic information about you that is provided by you when we meet in person, over the telephone, via emails, postal mail, or obtained by me with your authorization to prepare your income tax return(s). This information includes, but is not limited to, the following: the taxpayer's identity, the nature, source or amount of income, payments, receipts, deductions, net worth, tax liability, deficiencies, closing agreements, banking information, investment accounts, credit cards, and information regarding actual or possible investigation of a return.

Information we receive from you or send to you, including attachments and enclosures, via any manor may be retain in perpetuity. Specifically, I may retain the content of any email message, your email address, attachments, etc sent to me and the subsequent response to you.

Parties to Whom Information is Disclosed

For current and former clients, my firm **does not disclose any** nonpublic personal information obtained in the course of my practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to my employees, and in limited situations, to unrelated third parties who need to know that information to assist me in providing services to you. We do not share any of your confidential tax return information with any "other third-party." An "other third-party" is any entity not referenced above. That means we cannot disclose your identity, income, net worth, tax liabilities, or other protected information to the Internal Revenue Service, state tax authorities, unmarried partners, friends, relatives, real estate agents, mortgage brokers, banks, or any other person or company **without your explicit WRITTEN authorization**. In all such situations, the confidential nature of information shared is stressed. In any email transmission personal information will be redacted or the attachment password protected..

Protecting the Confidentiality and Security of Current and Former Client's Information

My firm retains records relating to professional services provided so that we are better able to assist you with your professional needs and to comply with federal and state laws regarding retaining tax returns. In order to guard your nonpublic personal information, my firm maintains physical, electronic, and procedural safeguards.

Professional ethical obligations and responsibilities demand the highest regard and duty toward the confidentiality of your personal information and security of your privacy. My firm will protect your personal information, use it appropriately, and accomplish our engagements with you in such manner as to always maintain your trust and confidence.

If you have any questions, please do not hesitate to call.

Sincerely yours,



Joseph E. Garrison, CPA

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