



To Our Clients:

Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. We hope that by taking a few minutes to read it, you will have a better understanding of what we do with the information you provide us and how we keep it private and secure.

We collect certain personal information about you – but only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your income tax returns and may also provide various tax and financial planning services to you at your request.

Examples of sources from which we collect information include:

- interviews and phone calls with you,
- letters or emails from you,
- tax return or financial planning organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, income, and other tax-related data, and
- financial history questionnaires.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients 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 services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

Thank you for allowing us to serve your accounting, tax, and financial planning needs. We value your business and are committed to protecting your privacy. We hope you view our firm as your most trusted advisor and we will work to continue earning your trust. Please call us if you have any questions or if we can be of further service.

Sincerely,
Felhofer CPA sc