



Our Privacy Policy

As CPAs, our professional and ethical responsibilities have always demanded no less than the highest regard 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 in compliance with the following policies, and perform our engagements so as to always maintain your trust and confidence in us.

What Personal Information Do We Collect?

In order to provide you with professional services and meet your needs in the course of tax preparation, compliance and planning, financial planning, and other engagements, we collect various types of personal information about you.

We may gather information from you verbally, in writing or electronically. Such information includes, for example, your (or your spouse's or dependents') name, address, social security number, income, investments and other assets, and other tax, financial and personal information. This can also include information transmitted on an internet "cookie" when your browser interacts with our website, such as your password to our site, your preferences on the site, and your internet service provider's address.

We also may solicit and/or receive information about you from others. Such information may include, for example, investment, loan or banking activity, balances or account numbers, legal agreements and documents, credit rating or history, tax records or history, accounting and transaction details, and other information.

Is Personal Information Shared with Others?

Except as described below, we do not share your personal information with anyone without your express consent. This includes your family members and relatives, employees, employers, vendors, bankers, financial advisors, clients or customers, and business partners or other associates. This is especially true when any of these other parties are also clients of our firm. We do, however, treat each spouse on a jointly filed return we prepare as entitled to information about, and copies of, the return without express consent of the other, since each has joint and several liability for the accuracy of the return and any related penalties or legal actions. This remains true in divorce or separation situations, or when one spouse is not a client.

The law permits or requires disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, or as part of actual or threatened legal proceedings or alternate dispute resolution.

We may share any information we collect (except for consumer reporting agency information, which we do not disclose) to nonaffiliated companies which perform support services on our behalf, such as tax or data processing, transmission of electronic returns or data, records retention, mailing services, clerical support, payroll services, etc. We may also disclose your name as a client for our own marketing purposes. We do not sell or otherwise disclose our client list or any of your personal information to outside parties for their marketing or solicitation use.

We may also share your information with other parties who help assure our compliance with professional standards (such as peer review), or who conduct due diligence procedures, such as if we consider a sale or merger of our practice.

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 must agree to adhere to internal confidentiality policies and are subject to disciplinary action for any policy violations. We also take appropriate precautions, such as confidentiality agreements for example, before allowing access to your information by any outside parties. Should you cease to be an active client or our relationship end for any reason, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

Thank You!

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

Best regards,

Neilley & Co. CPAs Inc.