

# TAXES PLUS

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## Privacy Policy

Your privacy is very important to us. Please read the following privacy policy.

Enrolled Agents, like all providers of personal financial services, are required by law to inform their clients of their policies regarding privacy of client information. Enrolled Agents have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore we have always protected your right to privacy.

### **Types of Nonpublic Personal Information We Collect**

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

- \* Through interviews regarding your tax situation
- \* Through applications, 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; from documents you provide
- \* From tax-related documents you provide that are required for processing tax returns, such as W-2's, 1099-R, 1099-INT and 1099-DIV, and stock transactions

### **Parties to Whom We Disclose Information**

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, digital vendors like professional tax preparation software and, in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you, and to others that you have permitted or requested to disclose by authorization from you in writing. In all such situations, we stress the confidential nature of information being shared.

### **Protecting the Confidentiality and Security of Current and Former Clients' Information**

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards and legal obligations.



Joyce Mohr, EA  
Taxes Plus