

# Privacy Policy

To meet the requirements of the Gramm-Leach-Bliley Act of 1999, I maintain the following policy:

I collect nonpublic information about my clients from the following sources:

Information I receive from clients on applications, tax organizers, worksheets, and other documents I use in tax preparation or providing financial service, or other forms

Information about client transactions with me, my affiliates, or others

I do not disclose any nonpublic personal information about my clients or former clients to anyone, except as permitted by law. I restrict access to nonpublic personal information about clients to members of my firm who need to know that information to provide services to them. I maintain physical, electronic, and procedural safeguards that comply with federal regulation to guard their nonpublic personal information.