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PRIVACY POLICY

As your CPA, I collect:
- Information provided by you from your tax organizer, worksheets, data from bookkeeping software, documents, e-mail, and discussions.
- Information from 3rd parties (such as brokerage houses, banks, financial advisors).
- Information that we develop as part of the engagement.

Electronic Procedures

As a CPA, I will need access to various documents that contain personal information, including social security numbers, birthdates, financial data and other various sensitive information. My office is doing everything it can to protect your sensitive information. Physical copies, if kept, are locked in a file cabinet in a locked office that is equipped with an active burglar alarm system. Electronically copied documents are password protected, encrypted and backed up offsite. We have updated our website to include many valuable tools and information for our clients, including a Secure Client Portal free of charge. If you provide a document to us via regular email, although we have password protection, it is possible, however unlikely, that the email could be intercepted. We utilize a share file system to upload and download documents. This is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail. This is an option to increase the privacy of your documents.

Sharing Your Information

As a CPA, I am required to keep all information about our engagement confidential; so, I will not disclose any information about you unless I have your approval or am required or permitted by law. This applies even if you are no longer a client. As your CPA, I am committed to the safekeeping of your confidential information and I maintain physical, electronic, and procedural safeguards to protect your information.

No confidential information shall be disclosed without your permission, except for the following:

- Assistants and/or other professionals with whom it is necessary to perform the services for which you have hired me.

- The Intuit software company (the software utilized to complete your tax return) for technical questions.
- To another CPA for professional consultation, and to professionals standards review, ethics or quality control peer review organizations.
- In compliance with a subpoena or a summons enforceable by order of a court.
- In cases where I reasonably believe that it is necessary to maintain or defend myself in a legal proceeding initiated by you or for loss prevention (example: attorney or liability insurance carrier).

<u>Release of Information at Your Request & Discontinuation of Business Relationship</u>
Under California law, you must give me written permission before your personal information can be released to any other party. If you would like any information provided to a third party (bank, bookkeeper, other CPA, IRS, etc.), please provide a written release with your signature. Acceptable methods of delivery include; via U.S. mail, fax, or email.

If our client relationship should ever be discontinued, at your request, I will furnish the succeeding bookkeeper or tax preparer an electronic copy of your last year's tax return, trial balance, or any other information or work papers I feel is pertinent at no charge to you. I will utilize a Secure Client Portal within my website or if you prefer direct email, I will do what I can to password protect the information, but it may not be encrypted. Workpapers and software input created and/or prepared by this office are the intellectual property of Maureen Weinstein CPA. Generally, we prefer not to provide a "back up copy" of the actual file of your tax return within the Lacerte software system to another tax preparer. However, in some cases, it may be a viable solution. Again, your request must be in writing and will only be provided to whom you request.