

The Tax Lady's
Protecting Your Privacy
Policy

The Tax Lady is giving you this *Protecting Your Privacy* policy because:

1. We strive to operate business in a manner that justifies your trust in choosing us to perform services that require you to reveal your personal information. The Tax Lady recognizes that confidentiality and safeguarding of your information is crucial in order to keep your trust. Furthermore, we must protect our clients from harm (e.g., identity theft, gossip, etc.).
2. The law requires The Tax Lady to give you this notice. These laws are referred to as the Gramm-Leach-Bliley Act and have to do with the storing and handling of paper and electronic files containing personal information. The Act requires businesses to have a written procedure in place for protecting clients' information from damage or unauthorized persons gaining access. This notice tells you about our procedures.

In this handout, The Tax Lady will inform you of the following:

- Who is covered by this policy and for how long
- The types of personal information we may collect from you
- How we will store your information so that others cannot gain access
- When we may disclose your personal information to others

Who is covered?

These policies apply indefinitely to current and former clients of The Tax Lady.

Information We Collect & Protect

As you know, The Tax Lady collects various pieces of personal information from you in order to prepare your income tax return(s) or assist you with audit letters, collection efforts, or other matters before the IRS. This includes your name, address, telephone number, social security number, date of birth, dependents, income, deductions, assets, expenses, bank account numbers, and other personal data. Naturally, this information needs safeguarding in order to protect your privacy and keep you from becoming a victim of identity theft. The Tax Lady has the following procedures in place to do just that!

Data Protection Methods

The Tax Lady has physical, electronic, and administrative procedures in place for restricting access to your personal information. This includes keeping your documents in a locked area where access is limited to your tax preparer and no one else. We also require passwords to open computer documents, use password encryption to send documents through e-mail, and only use other

organizations' services who themselves observe strict security measures (e.g., tax software companies, banks offering refund transfer products, electronic faxing service providers, etc.). Paper documents you leave with The Tax Lady are scanned for electronic storage and then shredded using a crosscutting shredder. If you drop off your paperwork and do not come back to complete your tax return or audit assistance, those papers are kept in a locked cabinet inside a locked office inside a locked building. If you do not return within three years, those documents are shredded using a crosscutting shredder. In the case of flood, fire, or other natural disasters, electronic backups of your documents are stored off site in a locked container in a secured facility.

Do We Share Your Information?

The Tax Lady provides services that require us to disclose your information to the IRS and individuals involved in the processing of your tax documents. For example, your tax return is e-filed through a software provider and there are instances where your return may be viewed (e.g., technical support issues). In general however, there is no reason for your information to be viewed by anyone other than your tax preparer and the IRS. As we prepare your tax return, along the way we may ask your permission to use or share portions of your tax information with another service provider and ask you to sign a document giving your consent. These providers are also required to comply with privacy laws and protect your personal information. For example, if you choose to have your tax preparation fees withheld from your refund or to have your refund loaded on a debit card provided by The Tax Lady, the bank providing the refund transfer service or debit card will need portions of your personal information to provide you their services (e.g., your name, address, driver's license number, amount of refund, bank account information, etc.). Other than your refund amount, the specific details of your tax return are not disclosed to these banks. If anyone calls The Tax Lady to request information regarding your tax return, The Tax Lady cannot provide answers without your knowledge or consent. A final reason why your information may be shared is if The Tax Lady is subpoenaed to provide it in a court of law. You will know in advance if this happens.

In Conclusion

The Tax Lady hopes you find this *Protecting Your Privacy* policy informative and a helpful aid to understanding how your personal information is treated, stored, and shared. Again, we honor your business and aim to provide you with professional and ethical services. Please contact us at 205.476.6104 if you have further questions.