



Privacy Policy:

Your Privacy is Important to Us:

We highly value your trust and confidence in us and want to assure you that your personal information is kept completely confidential by us. As a Certified Public Accounting firm, we adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of your information. Although CPA firms are no longer subject to the notice requirements of the Gramm-Leach-Bliley Act (GLBA), we believe in good business practice and therefore are disclosing our Privacy Policy to you. This Privacy Policy summarizes what information we collect about you, the limited times when we may share it with others, and how we protect your privacy.

Types of Personal Information We Collect:

In order to meet your business needs in the course of tax preparation, tax and financial planning, bookkeeping and other accounting services we provide to you, we collect various types of personal information about you from the following sources:

Information that we receive from you when we meet with you in person or over the telephone, when you send us information by mail, email, fax or contact us form online, on tax preparation worksheets, financial history questionnaires, or other documents used in preparing your tax returns or in providing other services to you. Such information may include, for instance, your name, address, birth date, social security number, bank account, income and investment sources and amounts, and other tax and financial attributes about you.

Parties to Whom We Disclose Information:

As a general rule, we do not disclose personal information about our clients or former clients to anyone. However, we may share personal information for our everyday business purposes such as to process your transactions, maintain your accounts, report to court orders and legal investigations, or report to credit bureaus. We may also share personal information to third parties that perform other support and marketing services on our behalf like data processing, market research, mailing etc. to offer our products and services to you. For your protection, our agreements with these entities require that they also keep your personal information in the strictest of confidence, just as we do.

We do not share personal information with unaffiliated third parties without your express consent, except as permitted by law and as described below.

The law permits disclosure in certain circumstances, such as if we must share information to protect against fraud or to protect against credit risk, in response to a court subpoena, and sharing with others

who may be assisting us in compliance with professional standards or who assist us in providing tax preparation and other services to you.

Protecting the Confidentiality and Security of Your Personal Information:

Keeping your information confidential and secure is of utmost importance to us. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alterations or premature destruction.

Should your status become inactive or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

SMS Compliance Privacy Policy:

For mobile numbers and SMS messages: Our Firm will never contact you to send any confidential messages over the SMS. SMS is only for ease and convenience of administrative message relay. We do not send any notifications or broadcast any messages to our clients on SMS or by mass calling. No mobile opt-in will be shared with third parties/affiliates for marketing/promotional purposes.

Our Commitment to You:

Our ethical and professional obligations demand the highest regards and duty towards the confidentiality of your personal information and security of your privacy.

Thank you for allowing us to serve your accounting, tax, and financial planning needs. We value your business and are committed to protecting your privacy. We hope you view our firm as your most trusted adviser and we look to continue earning your trust. Please call us if you have any questions or if we can be of further service.

Best Regards,

Shah & Trivedi CPA, PLLC

www.shahandtrivedicpa.com