Dear Client,

Certified public accounting firms, like all providers of personal financial services, are required by law to inform clients of their policies regarding privacy of client information. Phillips Tax & Consulting has been, and continues 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. The information below will explain our overall commitment to privacy with respect to nonpublic personal financial information that our practice maintains about you.

Phillips Tax & Consulting Privacy Policy

Types of Nonpublic Personal Information We Collect

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

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 without your permission, except as required or permitted by law (for instance, a subpoena), in which case, we would notify you immediately. We provide information to our employees and with your permission, to third parties who need to know that information to assist us in providing services to you (for example, your banker, your attorney, etc.). In all such situations, we stress the confidential nature of the information being shared.

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

We retain protected digital records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in come 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.

Feel free to call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

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