

Privacy Statement

In engaging us as your tax preparer, you provide us with information that you entrust to us. Your privacy and maintaining confidentiality of your personal information are the highest priorities and responsibilities at every staff level of our firm. Not only is it good business - you expect it and it is required in this day and age of technology.

Why You Are Receiving this Notice

You are receiving this notice because you are a client of The Fresh Filer and Associates, LLC, or you are considering becoming our client. This notice describes our privacy policy as it pertains to information that you provide to us.

Types of Information We Collect

We collect certain personal information about you - but only when that information is provided by you or is obtained by us with your authorization. We use the information that you provide to prepare income tax returns and/or other services to you (at your request), that you engage us to perform.

Examples of sources from which we collect information include:

- interviews and phone calls with you,
- letters and emails from you,
- tax return or financial planning organizers and questionnaires, and
- other documents provided by you on behalf of yourself, your family, or your company/organization.

Confidentiality and Security of Non-public Personal Information

Except as otherwise described later in this notice, we restrict access to non-public personal information about you to employees of our firm and other parties who must use that information to provide services to you. Their right to further disclosure and use the information is limited by the policies of our firm, applicable law, and non-disclosure

agreements where appropriate. We also maintain physical, electronic, and procedural safeguards to guard your personal information from unauthorized access or alteration.

Parties to Whom We Disclose Information

As a general rule, we do not disclose personal information about our clients or former clients to anyone without your permission. However, to the extent required by law and applicable regulatory requirements, certain non-public information about you may be disclosed in the following situations:

- To comply with a validly issued and enforceable subpoena or summons.
- To provide workpapers or specific information to assist you in complying with industry-specific federal and state regulations and requirements.
- In conjunction with a prospective purchase, sale, or merger of all or part of our practice, provided that we take appropriate precautions (for example, through a written confidentiality agreement) so that the prospective purchaser or merger partner does not disclose information obtained in the course of the review.
- To provide information to affiliates of the firm and unaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed.

Marketing Our Products and Services

As permitted by applicable law, we may use personal information to provide you with materials about offers, products, and services that may be of interest to you. You may contact us at any time to opt out of the use of your personal information for marketing purposes.

In Closing

Thank you for allowing us to serve your tax preparation needs. We value your business and are committed to protecting your privacy.