



# **Pedroza & Hayes**

**Accounting and Consulting, LLC**

## Tax Information Privacy Notice

### **CONFIDENTIALITY**

It is our policy and responsibility to maintain the confidentiality of your personal and business information to the extent of the law.

### **PRIVACY POLICY**

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies.

We handle all information you provide with confidentiality. Your personal information and all other information you provide will only be shared with members of our firm, who need to know this information to complete work you have hired the firm to do. Section 7216 of the Internal Revenue Code prohibits the IRS and tax professionals from knowingly or recklessly disclosing tax return information to anyone else without the taxpayer's explicit consent. We will not disclose your information to anyone outside our firm without your express written consent unless we are legally required to do so. If you would like us to release information to a given third party, we will require your written consent. Exceptions to IRC 7216 include court orders, during tax administration investigations, when the Social Security Administration needs to establish liability for FICA taxes, and written request by state tax authorities.

We use technology to receive and provide documents which may contain sensitive information. We have taken steps to protect information and documents. Our firm has enacted a Data Security Plan to protect your data, which complies with the FTC's federal standards. The Data Security Plan outlines steps and procedures all our members follow to protect and safeguard information, including basic security steps, recognizing the signs of data theft, and understanding and complying with the FTC Safeguards Rule, which states that financial institutions must protect the consumer information we collect. Security updates are automatically installed on all computers, strong passwords are required to log into computers, software programs, data sharing portals, and wherever possible. We use secured networks and data storage is protected. Documents containing sensitive information are not shared via email unless they are encrypted; instead, documents are shared via secure portals.

### **AN EXPRESSION OF CONFIDENCE**

Referrals to our tax preparation services are welcome and appreciated. Since referrals are generally to individuals who may be your friends, family, or acquaintances, you can rest assured your personal, financial, and tax data will not be shared with them.

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