

DATA SECURITY & SAFEGUARDS STATEMENT

Lifeline Financial Team & Lifeline Management Group LLC

Effective Date: January 2026

Our Commitment

We are committed to protecting the confidentiality and security of sensitive personal, financial, and tax information entrusted to us by our clients. We maintain administrative, technical, and physical safeguards designed to protect client data from unauthorized access, disclosure, or misuse, in accordance with federal law and IRS guidance.

Information We Protect

Client information may include names, addresses, Social Security or Taxpayer Identification Numbers, tax returns, financial records, and other data necessary to provide tax preparation and business services. Access to such information is restricted to authorized personnel with a legitimate business need.

Safeguards We Maintain

Technical Safeguards: Antivirus and anti-malware software, firewalls, encrypted data storage and transmission, strong passwords, multi-factor authentication, and automatic system updates.

Administrative Safeguards: Limited user access, role-based permissions, monitoring of IRS-issued credentials (EFIN/PTIN), phishing awareness, and secure handling of records.

Physical Safeguards: Secure workspaces, locked storage for paper files, and proper destruction of documents and electronic equipment.

Monitoring & Incident Response

We monitor systems for suspicious activity and indicators of unauthorized access. In the event of a data security incident, we will act promptly to secure systems, notify appropriate authorities as required, and inform affected clients in accordance with applicable laws and regulations.

Business Continuity

We maintain secure backups and recovery procedures to restore data and continue operations in the event of a disruption, while taking steps to prevent future incidents.

Ongoing Compliance

We stay informed of evolving security risks and best practices through IRS alerts, professional guidance, and federal cybersecurity resources, and we update our safeguards as necessary.

This Safeguards Statement applies to all services provided by Lifeline Financial Team and Lifeline Management Group LLC, including affiliated DBAs.