Ohlsen & Associates

Privacy Policy

Like all providers of personal income tax preparation and investment/insurance services, we are required by law to inform our clients of our policies regarding privacy and client information. We have always been committed to protecting your personal information and right to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you, or obtained with your authorization. We collect and use this information to service your accounts and respond to your requests.

Parties to Whom We Disclose Information

For current and former clients we do not disclose any non-public personal information obtained in the course of our practice, except as required by law. Permitted disclosures include, for instance, providing information to our employees and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. We may refer this information to an affiliated financial or tax professional where such referral is thought to be in your interest. Please advise us if instead you would require us to hold all information, including basic directory information confidential under any circumstances. We restrict access to non-public personal information to those professionals necessary to helping you achieve your goals and we maintain physical, electronic and procedural safeguards to guard your non-public information.

Confidentiality and Security

Our employees are required to follow procedures with respect to maintaining the confidentiality of our client's non-public information.

Please let us know if you have any questions because your privacy, our professional ethics and the ability to provide you with quality tax preparation, investment and insurance services are very important to us.

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Client Name (please print)

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Client Signature Date

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Client Signature Date