

# Privacy Policy for WENDY DEGROOT TAX SERVICE LLC

**Last Updated: September 5, 2025**

Your privacy is a huge deal to me. This Privacy Policy explains what information I collect, how I use it, and how I keep it safe. This policy applies to all clients who use my tax preparation services.

When you hire me, you're trusting me with your information, and I take that responsibility seriously.

## 1. What Information I Collect

To prepare your taxes accurately, I need to collect certain personal and financial information from you. This may include:

- **Personal Information:** Your name, address, Social Security Number (SSN), date of birth, and contact information (email and phone number). I'll also need this for your spouse and any dependents, if applicable.
- **Financial Information:** Your income details (W-2s, 1099s, etc.), investment information, bank account numbers (for direct deposit or debit), and details about expenses you plan to deduct.
- **Other Information:** Any other information you provide that is necessary for me to accurately complete your tax returns.

## 2. How We Use Your Information

I use the information you provide for a few key purposes:

- **To Prepare Your Tax Returns:** This is the main reason I collect your data. I need it to fill out your federal, state, and local tax forms correctly.
- **To File Your Returns:** I use your information to electronically file your tax returns with the IRS and state tax authorities, but only with your explicit consent.
- **To Communicate With You:** I'll use your contact information to send you updates, ask questions about your tax documents, and deliver your completed returns.
- **To Comply with the Law:** I am required by law to retain certain records and may need to use your information to comply with legal or regulatory obligations.

## 3. How I Share Your Information

I do not sell or rent your personal information to anyone. Ever.

I will only share your information with third parties in the following limited circumstances:

- **Government Authorities:** I will share your information with the IRS and state/local tax authorities when I file your tax returns on your behalf.
- **As Required by Law:** If I am required by a subpoena, court order, or other legal process, I may disclose your information.
- **With Your Consent:** I may share your information with others (like a mortgage lender or financial advisor) if you give me your express written permission to do so.

## 4. Keeping Your Information Safe

Protecting your data is a top priority. I use a combination of physical, electronic, and procedural safeguards to protect your information from unauthorized access, use, or disclosure. This includes secure storage for physical documents and encryption for electronic data.

## 5. How Long We Keep Your Information

I am required by the IRS to keep copies of your prepared tax returns and supporting documents for a specific period of time (typically three to seven years). My holding period is ten years. After that period, we will securely destroy your information.

## 6. Your Rights

You have the right to review the information you have provided to me and make sure it's accurate. If you have any questions about the information I have on file, please let us know.

## 7. Changes to This Policy

I may need to update this Privacy Policy from time to time. If I make any significant changes, I will let you know by sending an email or posting a notice on my website.

## 8. Questions? Let's Talk!

If you have any questions at all about my privacy practices, please don't hesitate to reach out.

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