



PRIVACY NOTICE

O.A.K. Consulting Services, LLC recognizes the importance of protecting the information provided to us. Federal law gives consumers the right to limit some, but not all of the ways in which personal information may be shared. Federal law also requires us to explain the types of information we may collect from and about you or your business, how we may use or disclose that information, your rights with respect to your information, and how we protect that information.

Who This Privacy Notice Covers

This privacy notice applies to personal and business information we must collect to provide tax preparation and other products and services to our clients.

General Types of Information We May Collect

The types of personal and business information we collect and share about you, your spouse, your dependents, your business, and other individuals such as employees depend on the services or products we provide to you. This information may include, but is not limited to:

- **Personally Identifiable Information** (name, address, email, phone number, date of birth, social security number, or other government identification numbers);
- **Financial Information** (employment and income information, revenue, bank account information, assets, credits, deductions, and expenses);
- **Transaction Information** (banking, brokerage, and/or credit account numbers and transaction histories);
- **Payroll Information** (from business operations including certain employee personally identifiable information);
- **Tax Return Information and Associated IRS Filings;** and
- **General Demographic Information.**

All financial-based service companies must acquire and share client's personal and business information to run their everyday business. The following are methods of collection:

- Information you voluntarily provide. If you choose not to provide certain information requested by us, we may be unable to provide the services for which we have been commissioned to perform;
- Information we receive when you request services or information from us;
- Information related to transactions that you consider and/or complete with us or unaffiliated third parties; and
- Information from the Internal Revenue Service (IRS), other government entities, or unaffiliated third parties.

How Your Information May Be Used or Disclosed

Various laws and regulations and our own internal policies determine how your information is used and to whom it is disclosed. Ways in which we may use or disclose your information in accordance with the terms of this privacy notice and applicable law may include, but are not limited to:

- When permitted or required by law, we may use or disclose your information during the course of normal business. For example, this may include providing your information to employees and agents within our company.
- Upon your consent or where otherwise permitted by law, we may disclose your information to vendors who provide business services on our behalf (including tax preparers who perform outsourced services in connection with tax return preparation, as permitted by IRC Section 7216).
- We do not disclose or share your information to marketers or unaffiliated business partners unless required by law.
- We do not sell or rent your information. We retain your information in accordance with our document retention policies, applicable laws, and as otherwise needed.
- We may disclose your information to unaffiliated parties (including government entities) when we have a good faith belief that such disclosure is required or permitted by law. This may occur, for example, in connection with a court order, legal process, or other judicial, administrative or investigative proceeding.

How We Protect Your Information

To protect your information from unauthorized access and use, we use security measures that comply with Federal law. These measures include computer safeguards, secured files, and policies for record retention and disposal. While we take reasonable measures to protect your information, we cannot guarantee absolute security of your information, as no form of electronic data transfer or storage can be considered 100% secure.

California Residents

If you are a California resident, you may have the following rights over your information:

- For the period covering the 12 months preceding your request, you may request that we disclose to you the categories and specific pieces of information collected about you, the categories of sources from which we collected that information, and the purposes for which your information was collected.
- You may also request that we delete information we collected from you.
- You have the right not to be discriminated against for exercising your rights over your information.

To exercise your rights, or if you have questions, you may submit a request via email at Doug@myoakconsultant.com. We will request personal information from you, such as your name, address, and last four digits of your Social Security number, to verify your identity in order to process your request.

How to Limit Use of Your Information

We may discuss or contact you about other services and products we can provide. If at any time you wish to limit the offers or promotions you receive from us, you may email us at Doug@myoakconsultant.com. We will make reasonable efforts to comply with your request. In some situations, it may still be necessary for us to send you information from time to time about transactions or accounts you have with us.

Changes to Privacy Notice or Other Policies

We reserve the right to change this privacy notice and any of the policies described in this notice at any time, consistent with applicable law. Clients will be notified of any material changes to this notice either through a post on our website <https://myoakconsultant.com> or through delivery of the updated notice directly to our clients via electronic methods or US Postal Service.