



SHAFFER & CO. LLC

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Privacy Policy

We value your trust and confidence and we want to assure you your personal information is kept completely confidential by us. This Privacy Policy is to help you understand what information we collect about you, the limited times we may share it with others, and what measures we take to protect your privacy.

What Personal Information Do We Collect?

In order to meet your needs in the course of tax return preparation, tax and financial planning, and tax compliance engagements for you, we collect various types of personal information about you from the following sources:

Information we receive from you in person, by the phone, mail or e-mail, on tax preparation worksheets, and on other documents or forms we use in preparing your tax return or providing other services for you. Such information includes for instance your name, addresses, social security number, income, investments and other assets, and other tax and financial information about you.

Information we receive from others about your transactions or relationships with them. Such information includes, for instance, investment, loan or banking activity, balances or account numbers, legal agreements and documents, and other information we gather in the course of providing services to you.

Information we receive from a consumer reporting agency, such as your credit history and outstanding loan balances.

Is Personal Information Shared With Others?

We do not share any personal information about you with anyone without express written consent, except as permitted by law and as described below.

The law permits or requires disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, or as part of actual or threatened legal proceedings or alternate dispute resolution.

We may share any information we collect (except for consumer reporting agency information, which we do not disclose) to nonaffiliated companies which perform support services on our behalf (such as tax or data processing, transmission of electronic returns or data, records retention, and mailing services). We do not sell or otherwise disclose our client list or any of your information to outside companies for their marketing or solicitation use.

We may also share your information with other parties who help assure our compliance with procedures such as if we consider a scale or merger of our practice.

How Do We Protect the Confidentiality and Security of Your Personal Information?

Keeping your information confidential and secure is of utmost importance to us. We follow standard industry practices to actively protect the confidentiality, security, and integrity of your personal information. We also maintain physical, electronic, and procedural safeguards to guard your personal information. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. And we take appropriate precautions such as written confidentiality agreements before sharing your information with any outside parties.

Should you become an inactive client or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

Our Pledge to You

Our professional ethical obligations and responsibilities have always demanded no less than the highest regard and duties for the confidentiality of your personal information and the security of your privacy. We will protect your personal information, use it only as necessary, and perform our engagements so as to always maintain your trust and confidence with us.

Thank you for allowing us to be of service, we truly value our relationship with you. We hope you view our firm as your most trusted advisor, and we will work to continue earning that trust. Please call us anytime you have questions or when we may be of further service.

Best Regards,
Shaffer & Company