

EDWARDS TAX & FINANCE SERVICES, LLC

Privacy Notice – 2025

Our Commitment to Your Privacy

Edwards Tax & Finance Services, LLC (“we,” “us,” or “the Firm”) values your privacy and protects personal information in accordance with applicable law. We collect only the information necessary to prepare and file your tax return and to provide related services.

Information We Collect

We may collect non-public personal information such as:

- Names, addresses, dates of birth
- Social Security numbers or ITINs
- Income, tax, and financial records
- Bank account information
- Supporting documentation provided by you

How We Use Your Information

Your information is used solely for:

- Preparing and filing tax returns
- Complying with federal and state tax laws
- Communicating with you regarding your tax matters

Information Sharing

We do not sell or disclose your personal information to third parties except:

- As required by law
- To authorized service providers involved in tax processing (e.g., tax software providers or bank partners you elect to use)
- With your written consent

Data Security

We maintain reasonable administrative, technical, and physical safeguards to protect your information, including a Written Information Security Plan (WISP) in compliance with IRS Publication 4557. We take reasonable measures to safeguard personal information, but no electronic method of transmission or storage is 100% secure.

Retention of Information

Tax records are retained as required by law. When records are no longer needed, they are securely destroyed or deleted.

Your Rights

You may request access to your records or ask questions regarding our privacy practices at any time.

Contact Information

If you have questions about this Privacy Notice or our data protection practices, please contact:

Edwards Tax & Finance Services, LLC

Email: hello@edwardstaxfinance.com

Phone: 540.792.4700