



Privacy Policy

We value the trust our clients place in us and are committed to safeguarding the sensitive personal information entrusted to our firm. Our privacy practices are guided by both our professional obligations and our personal commitment to maintaining the highest standards of confidentiality, integrity, and client service.

At WZ Accountants (also known as Rose Woodworth, C.P.A., P.C.), we do not share our clients' personal information with third parties for their marketing purposes. We treat all client information with the utmost respect and in accordance with this Privacy Policy.

Information We Collect

We may collect non-public personal information about you from a variety of sources, including, but not limited to:

- Interviews and communications regarding tax and financial information
- Applications, organizers, and other documents that provide information such as name, address, telephone number, Social Security number, number of dependents, income, banking information, and other tax-related data
- Tax and financial documents provided by clients for return preparation or advisory services, including Forms W-2, 1099-R, 1099-INT, 1099-DIV, and records of investment or stock transactions

Information Disclosure

We do **not** disclose any non-public personal information about our current or former clients to anyone, except:

- As specifically authorized or requested by the client, or
- As required or permitted by law or professional standards

Information Protection and Access

Access to client information is restricted to employees and trusted subcontractors who require such information to perform services on our clients' behalf. We maintain physical, electronic, and procedural safeguards designed to protect client information and comply with applicable federal regulations.

Use of Technology and Third-Party Service Providers

To efficiently provide services, we may transmit data over the internet, store electronic data using cloud-based software applications, or provide access through secure third-party portals. Client information may be stored or transmitted using these methods.

We may utilize third-party service providers—such as tax preparation software and secure document management platforms—to support our services. We employ reasonable measures to safeguard client data in these environments and require our third-party vendors to maintain appropriate data security standards consistent with applicable laws and professional requirements.

Commitment to Confidentiality

We use reasonable efforts to protect client information and maintain confidentiality in accordance with applicable laws, regulations, and professional standards. Protecting our clients' personal information is a core component of our professional responsibility and client relationship.

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