



Privacy Policy

We appreciate and value that our clients entrust us with their sensitive personal information, and the primary guide in our privacy policy is our professional and personal commitment to ensuring that our clients have confidence in our professionalism and dedication to client service.

The core of our commitment is that we do not share any of the personal information that our clients entrust to us with any third parties for their marketing purposes. At WZ Accountants (aka Rose Woodworth, C.P.A., P.C.), we treat our clients' personal information with the utmost respect consistent with this privacy policy.

We collect nonpublic personal information about you from various sources, including, but not limited to:

- Interviews regarding client tax information
- Applications, organizers, or other documents that supply such information as a client's name, address, telephone number, Social Security Number, number of dependents, income, bank details, and other tax-related data
- Tax-related documents provided by a clients that are required for processing tax returns, such as Forms W-2, 1099-R, 1099-INT, and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning our clients, except to our employees or trusted subcontractors who need such information in order to provide products or services to our clients. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard our clients' personal information.

In the interest of facilitating our services to our clients, we may send data over the Internet, store electronic data via computer software applications hosted remotely on the internet, or allow access to data through third-party vendors' secured portals or clouds. A client's confidential electronic data may be transmitted or stored using these methods. We may use third-party service providers to store or transmit this data, such as providers of tax return preparation software. In using these data communication and storage methods, our firm employs measures designed to maintain data security. We use reasonable efforts to keep such communications and data access secure in accordance with our obligations under applicable laws and professional standards. We require our third-party vendors to do the same.

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