

# SOF LEDGER LLC – PRIVACY POLICY

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Effective Date: January 2, 2026

Last updated: January 2, 2026

At SOF Ledger LLC, safeguarding client data is our highest priority. We understand the sensitivity of financial information and take every measure to ensure its protection. This Security Policy outlines our practices for maintaining confidentiality, integrity, and availability of client records across all systems and processes.

## ***1. Data Collection & Use***

We collect only the information necessary to perform bookkeeping, reconciliation, and financial reporting services. All data shared with SOF Ledger LLC is used strictly for professional purposes and never for third-party marketing, resale, or distribution without written consent.

## ***2. Data Storage & Encryption***

All electronic files are stored in encrypted cloud environments that comply with U.S. data protection standards, including AES-256 encryption and SSL/TLS protocols. Access to these environments is protected by multi-factor authentication and strong password requirements. Local storage is minimized and encrypted using enterprise-grade security software.

## ***3. Access Control***

Only authorized personnel within SOF Ledger LLC have access to client data. Access permissions are granted based on job responsibility and reviewed regularly. Each team member signs a confidentiality agreement and completes ongoing data security training.

## ***4. Data Transmission***

All client data transmitted electronically is protected using encrypted channels (e.g., secure file transfer portals, password-protected PDFs, and encrypted email attachments). Sensitive data is never shared over unsecured platforms or public networks.

## ***5. Third-Party Integrations***

We partner only with reputable, security-compliant software providers such as QuickBooks Online, Microsoft, and Google Workspace. Each vendor undergoes a thorough review to ensure compliance with industry standards including SOC 2, GDPR, and CCPA frameworks.

## ***6. Backup & Recovery***

Client data is backed up regularly using encrypted, redundant storage solutions to prevent loss in the event of system failure. Disaster recovery procedures are reviewed and tested periodically to ensure data availability and integrity.

## ***7. Confidentiality & Non-Disclosure***

SOF Ledger LLC maintains strict confidentiality regarding all client information. No data, financial or otherwise, will be disclosed to any third party without prior written authorization from the client, except where required by law.

## ***8. Data Retention & Disposal***

Client data is retained only for as long as necessary to fulfill service obligations and comply with legal or contractual requirements. Once data is no longer required, it is securely deleted or destroyed using industry-standard wiping and shredding procedures.

## ***9. Incident Response***

In the unlikely event of a data breach or security incident, SOF Ledger LLC will immediately investigate, contain, and mitigate the issue. Clients will be notified promptly with a summary of the event, corrective actions taken, and recommendations for further protection.

## ***10. Client Responsibilities***

Clients are responsible for maintaining the confidentiality of their own system credentials and ensuring that sensitive financial data is transmitted to SOF Ledger LLC only through approved secure channels. Clients should immediately report any suspected unauthorized access or potential breach to SOF Ledger LLC for investigation.

## ***11. Policy Review & Updates***

This Security Policy is reviewed annually or whenever there are significant changes in technology, regulations, or business operations. The updated version will always be available upon client request.

SOF Ledger LLC remains committed to upholding the highest standards of integrity and security in managing your financial data. Our promise is simple: your trust is our most valuable asset, and we protect it with every measure available.

## ***12. Contact Information***

For any questions regarding this Agreement or the Services provided, the Client may contact:

Principal & Financial Health Partner: **Brian Woogerd**

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945 Lake Murray Blvd  
Irmo, SC 29063

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