



Privacy Policy

Effective Date: July 1, 2026

At **Alvey Sierra Financial**, protecting your personal and financial information is a responsibility we take seriously. This Privacy Policy explains how information is collected, used, stored, and protected when you visit our website, request information, or engage our professional services.

By using this website, you agree to the practices described in this Privacy Policy.

Information We Collect

Depending on the services you request, we may collect information including:

- Name
- Business name
- Mailing address
- Email address
- Telephone number
- Tax identification number (when necessary)
- Financial and accounting information
- Payroll information
- Tax documents and supporting documentation
- Information submitted through contact forms or secure client portals
- Communications exchanged by email, telephone, or other electronic means

We collect only the information reasonably necessary to provide our professional services.

How We Use Your Information

Information collected may be used to:

- Respond to inquiries.
- Provide accounting, bookkeeping, payroll, tax preparation, and advisory services.
- Prepare and file tax returns when authorized.
- Maintain client records.
- Communicate regarding appointments, services, deadlines, and regulatory updates.
- Process invoices and payments.

- Comply with applicable legal and regulatory obligations.
- Improve the quality of our services and website.

Your information is never sold to third parties.

Confidentiality of Client Information

As a provider of accounting and tax services, confidentiality is one of our highest professional responsibilities. Information provided by clients is treated as confidential and is disclosed only:

- With your authorization.
- When required by applicable law.
- When necessary to comply with IRS, Puerto Rico Department of Treasury (Departamento de Hacienda), or other governmental requirements; or
- To trusted service providers who assist in delivering our services and who are contractually obligated to maintain confidentiality.

Data Security

Reasonable administrative, technical, and physical safeguards are implemented to protect personal information against unauthorized access, disclosure, alteration, or destruction. While no method of electronic transmission or internet storage can be guaranteed to be completely secure, every reasonable effort is made to safeguard your information.

Secure Client Communications

Whenever possible, confidential documents should be submitted through our secure client portal or other secure methods designated by Alvey Sierra Financial. Although email is convenient, it may not always be the most secure method for transmitting sensitive financial information.

Cookies and Website Analytics

This website may use cookies and similar technologies to improve user experience, analyze website traffic, and enhance website functionality. Cookies do not provide access to your personal files or information stored on your device. You may disable cookies through your browser settings; however, certain features of the website may not function properly.

Third-Party Services

Our website may include links or integrations with third-party providers such as:

- Appointment scheduling platforms
- Secure document portals
- Payment processors
- Email communication services

- Cloud storage providers

Each third-party provider maintains its own privacy practices. We encourage users to review their respective privacy policies.

Retention of Information

Client records are retained for the period required by applicable federal and Puerto Rico laws, professional standards, and legitimate business purposes. When records are no longer required, they are securely destroyed or permanently deleted.

Your Rights

Depending on applicable law, you may have the right to:

- Request access to your personal information.
- Request correction of inaccurate information.
- Request updates to your contact information.
- Withdraw consent where legally applicable.
- Request deletion of certain information, subject to legal and professional record retention requirements.

Requests may be submitted using the contact information provided below.

Children's Privacy

This website is intended for adults seeking professional accounting and tax services. We do not knowingly collect personal information from children under the age of 13.

Changes to This Privacy Policy

This Privacy Policy may be updated periodically to reflect changes in our services, legal requirements, or business practices. The revised version will be posted on this page with the updated Effective Date.

Contact Us

If you have any questions regarding this Privacy Policy or the handling of your personal information, please contact:

DBA Alvey Sierra Financial

Email: miriam@avtpr.com

Phone: (939) 342-4518

Virtual Services Available in Puerto Rico and the United States.