



Privacy Policy

Alvey-Sierra Financial

At Alvey-Sierra Financial, protecting the privacy and confidentiality of your information is a priority. This Privacy Policy explains how information is collected, used, stored, and protected when you visit our website, submit information through our online forms, use our secure client portal, or request accounting, tax, payroll, advisory, or related services.

By using this website or submitting information through our systems, you acknowledge and agree to the practices described in this Privacy Policy.

Information We Collect

Information may be collected directly from you when you:

- Submit a service request form.
- Schedule a consultation.
- Upload documents through our secure portal.
- Contact us by email, phone, or other communication methods.
- Engage our services.

Depending on the services requested, information collected may include:

- Name and contact information.
- Business information.
- Taxpayer identification information.
- Financial and accounting records.
- Payroll information.
- Tax documents and supporting records.
- Information required to provide professional services.

Only information necessary to evaluate, provide, or support requested services is collected.

How Your Information Is Used

Information provided may be used to:

- Evaluate service requests.
- Communicate regarding services and appointments.
- Prepare tax returns and related filings.
- Provide accounting, bookkeeping, payroll, and advisory services.
- Verify identity and comply with professional standards.
- Maintain client records.

- Meet legal, regulatory, and compliance obligations.

Information will not be sold, rented, or shared with third parties for marketing purposes.

Document Security

Reasonable administrative, technical, and physical safeguards are maintained to protect the confidentiality of information entrusted to us.

Documents submitted through secure systems are handled with care and are accessed only when necessary to provide services or comply with legal requirements.

While every effort is made to protect information, no internet transmission or electronic storage system can be guaranteed to be completely secure.

Sharing of Information

Information may be disclosed only when necessary:

- To comply with applicable laws or legal obligations.
- To respond to lawful government requests.
- To authorized service providers assisting with technology, software, or secure document management.
- When expressly authorized by the client.

Only the minimum information necessary for the intended purpose will be disclosed.

Client Portal and Third-Party Services

Alvey-Sierra Financial may utilize third-party software providers, secure portals, electronic signature platforms, accounting systems, tax software, cloud storage providers, and payment processors to deliver services efficiently.

These providers maintain their own privacy and security practices. Clients are encouraged to review the privacy policies of any third-party platform used in connection with our services.

Cookies and Website Analytics

This website may use cookies and similar technologies to improve website functionality, analyze usage patterns, and enhance the visitor experience.

Visitors may modify browser settings to limit or disable cookies; however, some website functions may be affected.

Retention of Information

Client records and supporting documentation may be retained for the period required by professional standards, legal requirements, regulatory obligations, and business recordkeeping practices.

Retention periods may vary depending on the nature of the services provided.

Your Rights

You may request to:

- Review information provided to us.
- Correct inaccurate information.
- Update contact information.
- Request information regarding how your data is being used.

Certain information may be retained when required by law, regulation, professional standards, or legitimate business purposes.

Children's Privacy

This website and services are not directed toward individuals under the age of 18. Information is not knowingly collected directly from minors without appropriate authorization.

Changes to This Privacy Policy

This Privacy Policy may be updated periodically to reflect changes in services, legal requirements, technology, or business practices.

The most current version will always be available on our website.

Contact Information

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

Alvey-Sierra Financial

Email: miriam@avtpr.com

Phone: (939) 342-4518

By using this website, submitting information, or engaging our services, you acknowledge that you have read and understood this Privacy Policy.