

# WDK SERVICES INC.

## Privacy Policy

### 1. Our Commitment to Privacy

WDK Services Inc. respects your privacy and is committed to protecting the personally identifiable information (PII) you provide to us, such as your name, address, Social Security Number (SSN), and financial details. This policy outlines how we handle your data in accordance with applicable legal requirements.

### 2. Information We Collect

We collect information necessary to prepare tax returns and provide financial services, including:

- **Client Information:** Name, address, email, phone, SSN, and date of birth.
- **Financial Information:** Income, deductions, expenses, and investment data.
- **Third-Party Data:** Information authorized by you or obtained from tax authorities (e.g., W-2s, 1099s).
- **Website Usage:** IP address, browser type, and navigation history via cookies.

### 3. Use and Disclosure of Information

We do not sell your personal information. Your data is used exclusively to:

- Prepare or assist in preparing tax returns.
- Provide requested tax consulting and financial services.
- Comply with legal requirements, such as subpoenas, court orders, or requests from taxing authorities (IRS, state agencies).
- Utilize service bureaus or secure cloud storage that assist in our operations.

### 4. Data Security

We maintain physical, electronic, and procedural safeguards to protect your non-public personal information. Access is restricted to employees and contractors who need the information to perform their job duties.

### 5. Data Retention

As a general policy, we maintain client tax data for approximately seven years.

## **6. Your Rights and Choices**

You may request access to, correction of, or deletion of your personal data held in our portal. You may opt out of certain data tracking technologies (cookies) on our website.

## **7. Changes to This Policy**

We may update this policy. If significant changes are made, we will notify you through our website or directly.

## **8. Contact Information**

If you have questions about this Privacy Policy, please contact us at [support@wdk-services.com](mailto:support@wdk-services.com) or 484-483-9525.

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