



## Privacy Policy

Under federal law financial institutions, Enrolled Agents, Certified Public Accountants and paid tax preparers are required to annually disclose how they handle the private information they receive from their clients. I receive non-public information about you from tax preparation documents, worksheets and other information you provide to me in order to prepare your tax return.

I restrict access to your personal information to those employees who need to know that information. I maintain physical, electronic and procedural safeguards that comply with federal standards to protect all personal data. All computers are password protected on boot-up and after any 10-minute period of inactivity.

My office is paperless. Your important original documents and receipts will be scanned into computer memory and then returned to you. No client-information papers of any kind are retained except when required by law.

In order to further protect your privacy and comply with the Federal Consumer Financial Information Privacy rules as set forth in the Gramm-Leach-Bliley Act of 1999 I require written authorization from you before I will:

- 1- Disclose any of your personal information to a third party and then—only the information that you specifically authorize.
- 2- Contact a third party on your behalf, e.g., a stockbroker to get information in order to prepare your tax return.

I will always consider the information you give me to be Private and Confidential. I do not share or disclose any of your non-public information with anyone except as what may be required by law or with your specific permission.

I value your business but more importantly I value the trust and confidence you place in me by choosing me as your tax professional and/or representative. Should you decide to close your account with me or become an inactive client I will still protect your information and adhere to the privacy policies and practices described in this statement. Please be sure to call if you have any questions.

Sincerely,

James Houston, EA  
ONE STOP TAX SHOP  
408.446.4433  
OneStopTaxShop.com