

Privacy Policy

I value your trust and confidence and I want to assure you your personal information is kept completely confidential. As a Certified Public Accountant, I adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of all client information.

This Privacy Policy is to help you understand what information I collect about you, the limited times I may share it with others, and what measures I take to protect your privacy.

What Personal Information Do I Collect?

In order to meet your needs in the course of tax return preparation, tax planning, tax compliance engagements, preparation of financial statements, and other bookkeeping services, I collect various types of personal information about you from the following sources:

- Information I receive from you in person, by the phone, mail or e-mail, on tax preparation worksheets, and on other documents or forms I use in preparing your tax return or providing other services for you. Such information includes, for instance, your name, address, social security number, income, investment and other assets, and other tax and financial information about you;
- Information I receive from others about your transactions or relationships with them. Such information includes, for instance, investment, loan or banking activity, balances or account numbers, legal agreements and documents, and other information I gather in the course of providing services to you.

Is Personal Information Shared with Others?

I do not share any personal information about you without your express consent, except as permitted by law and as described below.

The law permits or requires disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, or as part of actual or threatened legal proceedings or alternate dispute resolution.

I may share any information I collect (except for consumer reporting agency information, which I do not disclose) to nonaffiliated companies, which perform support services on my behalf (such as tax or data processing, transmission of electronic returns or data, records retention, and mailing services). I do **not** sell or otherwise disclose my client list or any of your information to outside companies for their marketing or solicitation use.

Member of the Georgia Society of CPAs

I may also share your information with other parties who help assure my compliance with professional accounting standards (such as peer review), or who conduct due diligence procedures, such as if I consider a sale or merger of my practice.

How Do I Protect the Confidentiality and Security of Your Personal Information?

Keeping your information confidential and secure is of utmost importance to me. I follow standard industry practices to actively protect the confidentiality, security, and integrity of your personal information. I also maintain physical, electronic, and procedural safeguards to guard your personal information. My employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. And I take appropriate precautions such as confidentiality agreements before sharing your information with any outside parties.

Should you become an inactive client or should our relationship end, I will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

My Pledge to You

As a CPA, my professional ethical obligations and responsibilities have always demanded no less than the highest regard and duties for the confidentiality of your personal information and the security of your privacy. I will protect your personal information, use it only as necessary, and perform our engagements so as to always maintain your trust and confidence.

Thank you for allowing me to be of service, I truly value my relationship with you. I hope you view my firm as your most trusted advisor, and I will work to continue earning that trust. Please call me anytime you have questions or if I may be of further service.

Best regards,

Ray M. Kilgore, CPA