

# VAN ELKINS AND ASSOCIATES, CPAs PRIVACY POLICY

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Like other providers of personal financial services, certified public accountants are required by law to inform clients of company policies regarding the privacy of client information. CPAs continue to be bound by strict professional standards of confidentiality; we have always protected your right to privacy. Additionally, state and federal law provide for criminal penalties for tax return preparers who disclose client information. Your written consent will be obtained before Van Elkins and Associates, CPAs uses or discloses your information for any purpose other than the preparation of your tax return.

This firm is a member of the American Institute of Certified Public Accountants and follows their Code of Professional Conduct which prohibits disclosing confidential client information.

## Types of Non-public Personal Information We Collect

Van Elkins and Associates, CPAs collects non-public personal information about you that you provide to us, or by which is obtained by us with your authorization. Examples of sources from which we collect information include client phone calls, interviews, client emails and letters, client financial planning organizer, tax returns, and questionnaires concerning financial history.

## Parties to Whom We Disclose Information

Current and former clients' non-public personal information obtained in the course of providing accounting services is not disclosed except as required or permitted by law. Permitted disclosures include providing client information to Van Elkins and Associates, CPAs employees and, in limited circumstances, to unrelated third parties who require such information to assist Van Elkins and Associates, CPAs in providing client services. The confidential nature of the shared information is emphasized in all circumstances.

## Protecting the Security and Confidentiality of Current and Former Client Information

Van Elkins and Associates, CPAs retains records relating to professional services provided to clients so that we may better assist clients with their professional needs. Additionally, records are retained in some circumstances to comply with professional guidelines and requirements. To protect your non- public personal information, Van Elkins and Associates, CPAs maintains electronic, physical, and procedural safeguards in compliance with CPA professional standards.

Your privacy, our professional ethics requirements, and our ability to provide quality financial services are important to our firm. If you have any questions regarding Van Elkins and Associates CPA's privacy policy, please call us at 865-523-8700.