



Privacy Notice for C&P Tax Service
Effective Date: January 1, 2024

1. Introduction

At C&P Tax Service, we are committed to protecting the privacy and security of our clients' information. This Privacy Notice outlines our practices regarding the collection, use, and sharing of client information in compliance with all applicable laws and standards relevant to tax and accounting firms.

2. Information Collection

We collect information necessary to provide our services, including but not limited to:

- Personal identification information (e.g., name, address, Social Security number)
- Financial information (e.g., income, assets, investments)
- Employment information (e.g., employer, salary)
- Other relevant tax and accounting information

3. Use of Information

The information we collect is used solely for the purpose of providing tax and accounting services, which includes:

- Preparing and filing tax returns
- Providing financial advice and planning
- Complying with legal and regulatory requirements

4. Sharing of Information

We do not share client information with third parties except as necessary to provide our services or as required by law. Uses of your information beyond the preparation of your tax return or accounting services are as follows:

- Sharing with regulatory bodies or law enforcement as required
- Disclosing to third-party service providers who assist in our operations (under strict confidentiality agreements)

We understand the sensitivity of your financial and personal information. Therefore, we practice strict control over the sharing of your information. Primarily, we do not sell, rent, or trade your information with third parties for their marketing purposes.

In certain cases, we may disclose your information to third-party service providers who assist in our operations. This is strictly limited to what is necessary for them to perform specific, authorized tasks on our behalf and is done under the following conditions:

Purpose of Disclosure: The sole purpose of sharing information with third-party service providers is to enhance our service delivery. This may include software solutions for tax preparation, secure document storage, or data analysis tools.

Selection of Service Providers: We diligently select third-party service providers who



demonstrate a strong commitment to privacy and data security. They are evaluated for their practices and policies on confidentiality and data protection.

Confidentiality Agreements: All third-party service providers are bound by strict confidentiality agreements. These agreements explicitly prohibit them from using, disclosing, or storing your information for any purpose other than the specific services they are providing to us.

Data Security Standards: Our third-party service providers are required to implement robust security measures that align with our own high standards of data protection. We regularly review their security practices to ensure the continued safety and confidentiality of your information.

Compliance with Laws: Any sharing of information is done in compliance with relevant privacy laws and regulations, ensuring that your data is handled lawfully and ethically.

We take your privacy seriously and ensure that any sharing of information is done with utmost care and responsibility, solely for the purpose of delivering superior tax and accounting services to you.

5. Data Security

We implement robust security measures to protect client information from unauthorized access, alteration, or destruction. These measures include:

- Secure storage of physical and electronic records
- Restricted access to client information
- Regular audits and updates to security practices

6. Client Rights

Clients have the right to:

- Request access to their personal information
- Request corrections to any inaccurate information
- Opt-out of certain uses of their information (where applicable)
- Lodge a complaint with the relevant regulatory authority about our handling of their information

7. Changes to Privacy Notice

We may update this Privacy Notice from time to time. Any changes will be posted on our website and, where appropriate, notified to clients directly.

8. Contact Us

For any questions or concerns about this Privacy Notice or our privacy practices, please contact us at:

C&P Tax Service
PO Box 1170
Ione, CA 95640

(209) 274-4720
info@cptaxservice.net

C&P Tax Service
19 E. Main Street
PO Box 1170
Ione, CA 95640



Phone: (209)274-4720
