

PRIVACY NOTICE TO OUR CLIENTS

Potts & Levering P.C. Privacy Policy:

Maintaining the privacy of the information you share with us in the process of doing business with Potts & Levering P.C. is extremely important to us. We want you to know that we have always kept your personal information confidential and are committed to maintaining the highest level of confidentiality with all the information we receive from or about you.

How we collect information:

In the conduct of our business with you we collect nonpublic personal information about you in connection with providing tax, financial and other services for you. We get most nonpublic personal information about our customers directly from our customers. The information you give to us when you request tax or other services from us generally provides us with the information we need in order to complete the service that you have authorized. We may also collect nonpublic personal information about you from:

- Applications, tax preparation worksheets and other forms we use in preparing your tax return, with information such as name, address, Social Security number, assets and income, employment status, birthdate;
- Your transactions with us or others, such as account activity, payment history and products or services purchased;
- Consumer reporting agencies and Verification services

How we protect information:

We maintain strong safeguards to protect the information you have shared with us. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information. All employees are required to comply with our established confidentiality procedures and policies. We restrict access to your personal and account information to those employees who need to know that information in order to provide products or services to you.

Our commitment to confidentiality:

We will not sell nonpublic personal information about you, nor will we disclose it to anyone, unless we have previously informed you in disclosures or agreements, have been authorized by you, or are permitted to do so by law. We will continue to adhere to the privacy policies and practices described in this notice even after your account is closed or becomes inactive. We are committed to maintaining the highest standards for protecting the information you share with us, and ensuring the privacy of all our customers. If you have any questions or concerns, please contact us.