

BUCKLEY & SITZMAN, LLP

Privacy Policy

CPAs, like all providers of personal financial services are required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Your Privacy is Important to us

We are committed to your privacy and retaining your trust. We respect your right to keep your personal information confidential and to avoid unwanted solicitations. Below is detailed what information we collect and how we use it.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. This information has been derived from the following sources:

1. Applications, tax preparation worksheets and any other documents that you may have provided for use in preparing your tax return.
2. Transactions with others or us.
3. Information we receive from a consumer-reporting agency

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Should you end your relationship with us or become an inactive client, we will continue to adhere to the policy regulations as written here. We are committed to retaining your confidence, and want to assure you that any information you give us remains safe and confidential.

Please email if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.