

GEORGE H. HERRO

CERTIFIED PUBLIC ACCOUNTANT, S.C.

Business and Tax Advisors

George H. Herro CPA, SC Privacy Policy

Preserving your trust is our core value. Protecting your privacy is fundamental to the way George H. Herro CPA, SC conducts business. Tax professionals, like all providers of personal financial services, are required by law to inform their clients of their policies regarding privacy of client information. We are strongly committed to fulfilling the trust that is the foundation of your expectations. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you from the following sources: (1) information we receive from your transactions and applications with us, such as information we use to prepare your tax return, your tax organizer, worksheets, documents and discussions; (2) contact information, such as your name, phone number, mailing address and e-mail address, from forms and service inquiries; and (3) any other information that we develop as part of our engagement and that is also provided to us by you or obtained by us with your authorization.

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, with your authorization, who need to know that information to assist us in providing services to you. We do not sell or rent nonpublic personal information about our clients to anyone. If we are asked to disclose any privileged communication or information on your behalf, unless we are required to disclose this information by law, we will not provide such disclosures until we have discussed this situation with you and obtain from you a signed written consent. In all such situations, we stress the confidential nature of information being shared.

Security to Protect the Confidentiality of Nonpublic Personal Information

We retain records relating to the professional services we provide so that we can better assist you with your needs. We restrict access to nonpublic personal information to those employees who need to know the information to provide service to you. We have policies and procedures in place to assist our employees in protecting nonpublic personal information. We maintain physical, electronic, and procedural safeguards that comply with our professional standards to guard your nonpublic personal information. We will not supply your records to any taxing authority we have only unless they present court order to do so. Should you choose to terminate our relationship, or become an inactive client, we will continue to adhere to the policies written in this statement.

Electronic Transmission of Information

In the interest of facilitating our service to you, we may communicate by facsimile transmission or send electronic mail over the internet. Such communication may include information that is confidential to you. All information, confidential and non-confidential, sent to you or third parties, with your consent, will be password protected. While we will use our best efforts to keep such communication secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and consent to our use of these devices.

We are committed to retaining your confidence and respect your privacy. Please contact us if you have any questions regarding our policy.

Sincerely yours,

George H. Herro CPA, SC

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