



Tax, Accounting, and Advisory Services

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## Privacy Policy of Digital Tax Group, PLLC

Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. We hope that by taking a few minutes to read it, you will have a better understanding of what we do with the information you provide us and how we keep it private and secure.

### A. Types of Information We Collect

We collect certain personal information about you – but only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare various types of tax returns and may also provide various tax and financial planning services to you at your request.

Examples of sources from which we collect information include:

- interviews and phone calls with you,
- letters or e-mails from you,
- tax return or financial planning organizers, and
- questionnaires.

### B. Use of Information

Your information may be used in the following ways:

- To provide our services to you including preparing various tax returns, financial statements, and other forms for various government and business matters
- To enhance and improve our services, for example, by performing internal research, analyzing user trends and measuring demographics and interests
- To process payments from you
- To process payments to you (including, but not limited to, refunds or reimbursements)
- Internal purposes, such as website and system administration or internal audits and reviews
- To communicate with you regarding services that may be of interest to you
- To respond to your requests and inquiries



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- To serve relevant advertisements to you when you visit our websites or other third-party websites (including social media platforms)
- To request your participation in surveys, focus groups, or other initiatives which help us to gather information used to develop and enhance our services
- To comply with applicable law(s) (for example, to comply with a search warrant, subpoena or court order) or to carry out professional ethics/conduct investigations

### **C. Parties to Whom We Disclose Information**

As a general rule, we do not disclose personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

- To comply with a validly issued and enforceable subpoena or summons. • In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.
- In conjunction with a prospective purchase, sale, or merger of all or part of our practice, provided that we take appropriate precautions (for example, through a written confidentiality agreement) so the prospective purchaser or merger partner does not disclose information obtained in the course of the review.
- As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.
- To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside service bureau to process tax returns or engaging a records-retention agency to store prior year records.)



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#### **D. Confidentiality and Security of Nonpublic Personal Information**

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to employees of our firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our firm, applicable law, our Code of Professional Conduct, and nondisclosure agreements where appropriate. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.

#### **E. Communication Preferences**

We strive to provide you with relevant and useful information related to our products and services. However, any promotional emails that we send will include a link at the bottom of the email to unsubscribe. Additionally, you can contact us using the information listed at the bottom of this policy to make changes to your communication preferences.

#### **F. Security**

We maintain administrative, technical and physical safeguards designed to protect personal information against accidental, unlawful or unauthorized destruction, loss, alteration, access, disclosure or use. Because no method of transmission over the Internet, nor method of electronic storage, is 100% secure, we cannot guarantee the absolute security of information you provide to us.

#### **G. Right to Access and Correct Your Personal Information**

Upon request, we will provide you with information about whether we hold any of your personal information. We will provide you with reasonable access to your personal information in accordance with relevant laws, including by making reasonable efforts to provide access to update your information. To protect your privacy and security, we will take steps to verify your identity before granting access or making changes to your personal information. You may email our Customer Support at [info@digitaltaxgroup.com](mailto:info@digitaltaxgroup.com), or send written request to the address below. We will respond to your request within a reasonable timeframe.

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Thank you for allowing us to serve your accounting, tax, and financial needs. We value your business and are committed to protecting your privacy. We hope you view our firm as your most trusted advisor and we will work to continue earning your trust. Please call us if you have any questions or if we can be of further service.

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