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S. Landau Services Privacy Policy

Your non-public personal information is collected from various sources:

• Information received from you on tax organizers, worksheets, client questionnaires, applications and other financial documentation you provide;

• Information you provide via personal interviews telephone conversations, faxes and e-mails;

• Information about your transactions with the firm;

• Information received about you from consumer reporting agencies (if background or credit checks are conducted on your behalf).

DISCLOSURE/USE

Unless you specifically authorize us to use and disclose your tax return information to generate financial products and services recommendations, your non-public personal information is not disclosed to any person or party, except as required by law or to facilitate filing your tax return.

Upon closing your account, your non-public personal information will not be disclosed to any person or party unless required by law.

SECURITY

Access to your information is restricted in a variety of ways:

• Only to those employees who have a need to know in order to provide products or services to you;

• Physical security, electronic security safeguards and strict procedural measures consistent with federal standards are in place to protect your non-public personal information.

Your privacy is important. Please trust that protecting your information is equally important. Please call if you have any questions.

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Securities offered through Avantax Investment Services℠, Member FINRA, SIPC,
Investment Advisory Services offered through Avantax Advisory Services℠,
Insurance services offered through Avantax Insurance Agency℠

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NATP National Association of Tax Professionals