

## Pro Financial Services Group, Inc. Privacy Policy

We value your trust and confidence and want to assure you that your personal information is kept completely confidential by us. As tax professionals, we adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of all client information.

This privacy policy is provided to help you understand what information we collect about you, how we may share it with others, and the measures we take to protect your privacy.

### **What Information Do We Collect?**

In order to meet your needs in the course of tax return preparation, tax and financial matters, and tax compliance engagements, we collect various types of personal information about you from the following sources:

- Information we receive from you in person, by phone, mail, through our website, on tax preparation checklists and worksheets, and on other documents or forms we use in preparing your tax return or providing other services for you. Such information includes, but not limited to, names, address, social security numbers, income, investment, portfolio, mortgage interest, and additional financial documents as required to complete your income tax returns.
- Information we receive from others about you and your transactions or relationships with them. Such information includes, but not limited to, investment, loan, banking activity, balances, account numbers, legal agreements, misc. other documents we require in the course of providing services to you.
- Information we receive about you from our website, other internet sites, and social media sites.

### **Is Information Shared with Others?**

We DO NOT SHARE any personal information about you with anyone without your express consent, except as permitted by law.

We DO NOT SELL or otherwise disclose our client list or any of your information to outside companies.

We may share information we collect with nonaffiliated companies which perform services on our behalf, such as transmission of electronic returns.

WE may share information with other employees and independent contractors to help assure your returns are completed correctly, proofread and to contact you and review them with you upon their completion.

**How Do We Protect the Confidentiality and Security of Your Information?**

Keeping your information confidential and secure is of utmost importance to us. We follow standard industry practices to actively protect the confidentiality, security, and integrity of your personal information. We also utilize physical, electronic, and procedural safeguards to protect your information.

All Employees, and Independent Contractors are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. We also take appropriate precautions before sharing your information in accordance with this privacy policy.

**Our Pledge to You**

As your tax professional, our ethical obligations and responsibilities have always demanded no less than the highest regard and duties for the confidentiality of your personal information and the security of your privacy. We will protect your personal information, use it only as necessary, and perform our engagements so as to always maintain your trust and confidence in us.

Thank You for allowing us to be of service, we truly value our relationship with you. We hope you view our firm as your most trusted advisor, and we will work to continue earning that trust.

Please call us anytime you have questions, or we may be of further service.

Respectfully,

*Michael A. Procaccia*

Pro Financial Services Group, Inc.