Financial Counseling & Administration Privacy Policy

CPAs, like all providers of personal financial services, are now 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.

Types of Nonpublic Personal Information Collected

You provide nonpublic personal information about you or it is obtained with your authorization.

Parties to Whom We Disclose Information

For current and former clients, no nonpublic personal information is disclosed in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, in limited situations, to unrelated third parties who need to know that information to assist me in providing services to you. In all such situations, I stress the confidential nature of information being shared.

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

I retain records relating to professional services that I've provided so that I'm 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, I maintain physical, electronic, and procedural safeguards that comply with professional standards.

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