

Privacy Policy

CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. We have always protected your right to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic information about you that is provided to us by you, or obtained by us with your authorization.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained during 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 who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

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

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. To guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with professional standards.

Wherever we collect sensitive information online, that information is encrypted and transmitted to us in a secure way. You can verify this by looking for a closed lock icon on your browser, or looking for "https" at the beginning of the address of the web page.

Offline, only employees who need the information to perform a specific job function (for example billing or customer service), are granted access to personally identifiable information. The computers/servers in which we store information are kept in a secure environment.

Your Access to and Control Over Information

We will use your information to respond to you, regarding the reason you contacted us. We also may contact you via email in the future to tell you about specials, or services, or to keep you informed. You may opt out of any future contacts from us at any time. You can do any of the following at any time by contacting us:

- See what data we have about you, if any
- Change/correct any data we have about you
- Have us delete any data we have about you, unless restricted by professional guidelines
- Express any concern you have about our use of your data

Please call 616-456-6464 if you have any concerns. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.