

## Your Privacy is Important!

At Cornerstone Tax Service, Inc. we value the confidence you have put in us and we want to assure you that your personal information is kept confidential. As an accounting firm, we adhere to the highest levels of ethical and professional standards to protect the confidentiality of your private information.

This Privacy Policy summarizes what information we collect about you, the limited instances when we share it with others, and how we protect your privacy.

## Types of Personal Information We Collect

In order to meet your needs during the preparation of your tax returns, tax and financial planning, and tax compliance engagements, we collect various types of personal information about you from the following sources:

- Information that we receive from you when we meet, or that you provide over the telephone, when you send us information via mail or, email, or fax, on worksheets and documents you provide for use during your tax preparation or in providing other services for you. This may include your name, address, date of birth, social security number, income sources as well as sources of investments, and other tax and financial attributes about you.
- Information about your transactions with us, our affiliates, or others. This type of information may include investment allocations and performance, investment objectives, and account balances.
- Information we receive from you, or send to you, at your request if you contact us online. We will retain the information you provide us to deliver email messages to you, or others on your behalf (i.e., your financial planner or mortgage lender). We will retain the content of your email messages, your email address, and our subsequent response to you.

## Parties to Whom We Disclose Information

We may share your personal information with our affiliates to aid in providing tax and financial planning solutions and opportunities to you. We DO NOT share personal information with unaffiliated third parties without your express consent, except as required by law and described below:

- The law permits disclosure in certain instances, such as if we must share information to protect against fraud or to protect against credit risk, in response to a court subpoena, and share with others who may be assisting us in compliance with professional standards, or those who assist us in providing tax preparation and other services to you.
- We may also share any, or all, of the information we collect, as described above (except for consumer reporting agency information) with nonaffiliated third parties that perform other support and marketing services on our behalf, such as outside data processing, tax preparation, and mailings. For your protection, our agreements with these entities require that they also keep your personal information in the strictest of confidence, just as we do.

## Protecting the Confidentiality and Security of your Personal Information

The confidentiality and security of your personal information is of the utmost importance to us. We maintain a strict level of physical, electronic, and procedural safeguards to guard your information. In doing so, we restrict access to your personal information to those employees who need to know that information to provide services to you and to the aforementioned support service companies. Those companies are, in turn, legally and contractually bound to maintain the privacy of any and all information shared. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. Should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

## Communications

### **Mobile Data Sharing**

We maintain clear limits on mobile data sharing. Mobile information collected through our website or messaging programs is used only for the purposes described in this policy and is handled with appropriate safeguards.

## **Messaging Program Questions**

If you have questions about our messaging program, please contact us through the contact information provided on this website.

## **Consumer Data Safeguards**

Your data will not be transferred to external organizations. We maintain appropriate safeguards designed to protect consumer information.

## **SMS Notices**

- You may opt out of SMS messages at any time by replying **STOP**.
- For help, reply **HELP**.

## **Our Pledge to You**

Our professional and ethical obligations and responsibilities demand the highest regard toward the confidentiality of your personal information and security of your privacy. We will protect your personal information, use it appropriately, and accomplish our engagements with you in such a manner as to always maintain your trust and confidence. Please contact our office if you have any questions regarding this policy.

We are committed to protecting the privacy and confidentiality of consumer information and mobile information.

## **Use of Information**

Consumer information and mobile information are used only for legitimate business purposes consistent with our services and operations.

## **Sharing Restrictions**

- Consumer data will not be shared, sold, or transferred to external organizations.
- Mobile data will not be shared, sold, or transferred to external organizations.
- Mobile information will not be shared with affiliates, nonaffiliated third parties, or external organizations for marketing or promotional purposes.

## **Terms and Conditions**

### **Confidentiality and Safeguards**

We maintain appropriate safeguards and confidentiality measures to protect consumer information and mobile information from unauthorized access, use, or disclosure.

### **Mobile Information Disclosure**

Mobile information is used only for business purposes and is not shared for marketing or promotional sharing.

By opting in to receive SMS messages from **Cornerstone Tax Service, Inc.**, you agree to receive **conversational messages**.

- **Message frequency:** Message frequency may vary. On average, 1-2 messages per month.
- **Message and data rates:** Message and data rates may apply.
- **Opt-out:** Reply STOP to unsubscribe at any time.
- **Help:** Reply HELP for assistance.

## SMS Privacy Terms

This policy identifies the sender contact method directly and clarifies how SMS-related information is handled so the terms are clear and consistent.

- **Sender contact method:** The message sender contact method is identified directly in this policy.
- **No sharing statement:** SMS privacy terms should clearly state that your data will not be transferred to external organizations.
- **Consistency with other language:** Any statement about sharing with affiliates or service providers should be reconciled so it does not conflict with the no sharing statement.
- **Clarity:** The SMS privacy terms should be written clearly and consistently throughout the policy.