Privacy Notice

We always strive to protect your right to privacy. Like all providers of personal financial services, we are now required by law to inform clients of our policies regarding privacy of client information.

1. **Types of Nonpublic Personal Information I Collect**

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

2. Parties to Whom I Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to related parties (i.e. MASTER PLAN BOOKKEEPING and/or FLOURISH FINANCIAL PLANNING) and 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.

3. 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. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with my professional standards. Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

4. IRS Taxpayer Bill of Rights

To learn more about the IRS's Taxpayer Bill of Rights, please visit www.irs.gov/taxpayer-bill-of rights

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