

Coastline Tax Services

Tax and Bookkeeping Services

Subject: Privacy Notice

[The context of “you” and “your”, as the point of view of a client, will be used for an individual or a business. “Our company” will be used to define Coastline Tax Services]

At Coastline Tax Services, we believe privacy of your sensitive personal and/or business information is one of our top priorities. This privacy notice will help you understand the privacy policies of our company.

As a client, you may be asked to disclose different types of information in order to ensure we provide you with the best service, and to follow laws established by the various agencies of the government, tax, and bookkeeping. This information includes the following but not limited to: Contact Information (name, address, phone number, email), Date of Birth, Marital Status, Government Identification numbers (Employer Identification Number, Social Security Number, Individual Taxpayer Identification Number, etc.), Financial Information (income, expenses, revenue, assets, liabilities, etc.), Employment/Work Information, Payment Information (bank account information, credit/debit card information, electronic payment account information, etc.), Business Information (vendors, customers, payroll, etc.), login information to miscellaneous accounts (if given consent by you), demographic information, history of events in your background.

If you decide to not provide information that is needed in order to fulfill your services with our company, we will inform you the repercussions of withholding the information, in which it may affect providing the best service for you.

The information you provide will only be used for the services that our business is hired to complete. Your services might include the IRS and state agencies, government entities, financial institutions, and non-affiliated parties requiring access to the information in order to accurately perform the services. If any of your information needs to be disclosed to a third party that goes outside the spectrum of what is necessary for your services, than that information will be discussed with you.

Our business also likes to share information on websites and social media outlets for marketing and advertising purposes. This includes the following but not limited to: statistics of client growth, region of clients, testimonials, reviews, and etc. In the events of most of the advertising and marketing purposes by our company, your identity and personal information will never be disclosed without your consent. The information used to represent you and others will be vague and not specific to a single person or company (e.g. “we’ve had a 10% increase in bookkeeping clients in San Diego, contact us today to see how we can help you”; “we have 100 tax returns filed this month alone, contact us so we can help you”; “We lowered another client’s tax liability by 90%, contact us for a free consultation”). Our company may ask you for permission to use your information that allows others to identify you to promote business operations. If asked and agreed upon by you, we will explain how your information will be used and

presented. If you do not agree to how your information will be presented at any time, we will kindly remove your information or change it to meet your standards.

In regards to protecting your information, our company makes sure to take necessary precautions to ensure your information is safe. These precautions include but not limited to: secured and locked storage devices and locations to protect physical and electronic information, video surveillance of said devices and locations, confidential and private outlets of disposing client information, electronic security precautions, password protection, and more.

Our company website does allow for you to submit questions or send messages to have contact with our company. The website may remember information such as your name, email address, the subject to your message, and the contents of your message from your submission to potentially use again for auto-populating fields to save time. This website provider may also store data to potentially send advertisements after viewing and submitting information on this website. If you do not wish this to occur, you may clear your internet search history and your cookies (small files that store information) to remove the auto-populated results from a previous submission, and to clear data from your website visit. Once the message is submitted from the website, the contents will be sent to secure and password protected email inboxes on secure and password protected websites to ensure your information stays private.

By law, our company is required to maintain information in regards to the services we provide (e.g. forms and services we prepare and information that was needed by you) for a specific period. By choice, our company maintains records for up to 8 years unless there is a request to dispose of information sooner than that period. If you decide to request information outside of the 8 year period, we have the right to not offer the information that was prepared by our services due to the event that the information was disposed of adequately. This is why we highly recommend you keep copies of the information documents you provide and completed documents we distribute to you in a safe and secured location.

We reserve the right to change the contents of this privacy notice at any time when it appears to be fitting. If we make any change to the contents that cover our privacy policies, you be notified by one of the following: the notice will be mailed or emailed to you, it will be distributed to you through the next engagement of services (e.g. filing a tax return, delivering prepared bookkeeping documents, etc.) or it will be posted on our website. If you have any questions regarding this privacy policy, please let us know.