

Privacy Policy

NLC Tax & Bookkeeping Services

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Your privacy is important to us, and we are committed to protecting your nonpublic personal information (NPI). As required by the *Gramm-Leach-Bliley Act*, we adhere to strict data-sharing regulations. Please read the following privacy policy carefully.

Information we collect

We collect nonpublic personal information about you and your household or business from various sources, including:

- **Interviews and discussions:** information obtained during interviews regarding your tax situation.
- **Documentation:** information from organizers or other documents that provide details such as your name, address, telephone number, Social Security number, number of dependents, income, and other tax-related data.
- **Tax-related documents:** information from documents required for processing tax returns, such as Forms W-2, 1099R, 1099-INT, 1099-DIV, and stock transactions.
- **Electronic tools and applications:** information collected, stored, reconciled, and compiled through electronic tools and applications.
- **Additional documents:** Any other documents you provide to assist in preparing your tax return.

Information Disclosure

We do not disclose any nonpublic personal information about our clients, prospective clients, or former clients to anyone except as requested by our clients in writing or as required by law. When disclosure is required by law, any impacted client will be notified.

Use of information for marketing Purposes

Client demographic information (name, address, email, telephone, family structure, and basic financial data, including AGI) may be used for marketing purposes. Internal employees will only use this data to provide access and education on tax-related offerings and changes based on tax code changes. We do not share this information with external marketing agencies or third parties.

Security and Confidentiality

We restrict access to your personal information. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to protect your personal information. These safeguards include:

- **Physical safeguards:** Secure facilities and restricted access areas.
- **Electronic safeguards:** Secure servers, firewalls, and encryption protocols.
- **Procedural safeguards:** Policies and procedures designed to protect your information and ensure compliance with federal regulations.

Opt-Out option

You have the right to opt out of any information sharing that is not mandated by law. If you wish to opt out, please contact us by writing to the address or email above.

Access to your information

You can access and review the information we collect and maintain about you. Please contact us in writing if you wish to access your information.

Questions and contact information

If you have any questions about this privacy policy or need further information, please get in touch with us before proceeding. You can reach us at the address provided or by calling our office.

Thank you for your trust and business.

Thank you,

Nicole Brown

Founder
NLC Tax & Bookkeeping Services

