

# Roesner Tax & Accounting, LLC

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We value you as our client, and your privacy is important to us. Please read our privacy policy below.

As an accounting, bookkeeping and tax firm, we collect nonpublic personal information about you from some or all of the following sources:

- \* Information received from you on applications, tax preparation worksheets, organizers and supporting schedules we use in preparing your tax returns and other forms.
- \* Information from tax-related documents you provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions, etc.
- \* Personal interviews, meetings and conferences with you.
- \* Information received from you and others about your transactions with others and with us.

We do **not** disclose any nonpublic personal information about our clients or former clients to any third parties, except as permitted by you or as required by law.

We restrict access to nonpublic personal and account information about you, except to employees or contractors who need access to such information in order to provide products or services to you.

We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you have any questions about our privacy policy, please contact us.

Thank you so much for the opportunity of serving you. We truly appreciate your patronage.

Sincerely,

*Roesner Tax & Accounting, LLC*