



PLEDGE OF CONFIDENTIALITY

Our firm maintains the strictest confidence concerning our clients' affairs because your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. You can rest assured that no one will learn about your business or tax status – even the relatives, associates or friends who might have referred you to us. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. Certified Public Accountants have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. A recent law change requires CPA's (along with banks, brokerage houses, and other financial institutions) to disclose our Privacy Policy to you – which we are more than happy to do.

We hope that by taking a few minutes to read it, you will have a better understanding of what we do with the information you provide us and how we keep it private and secure.

The nonpublic personal information we collect includes, but is not limited to, information about the source and amount of income and expenses, assets and liabilities and personal data such as social security numbers and dates of birth. We also obtain personal data through interviews & telephone calls with you or letters and emails from you.

In order to assist you with your accounting and tax matters, and, in some cases, to comply with professional guidelines, we retain records relating to the professional services we provide to you. We have rigorous physical, electronic and procedural safeguards in place to protect these records and they are accessed internally only on an "as-needed" basis. We periodically dispose for records through a certified destruction process or through shredding based upon record retention policies.

As a general rule, we do not disclose personal information about our clients or former clients to anyone. Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to employees of Strive Tax & Accounting, LLC and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our company, applicable law, our Code of Professional Conduct, and nondisclosure agreements where appropriate. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

- To comply with a validly issued and enforceable subpoena or summons.
- In the course of a review of our company's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.
- As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.
- To provide information to affiliates of our company and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside service bureau to process tax returns or engaging a records-retention agency to store prior year records.)
- In conjunction with a prospective purchase, sale, or merger of all or part of our practice, provided that we take appropriate precautions (for example, through a written confidentiality agreement) so the prospective purchaser or merger partner does not disclose information obtained in the course of the review.

Thank you for allowing us to serve your accounting, tax, and consulting needs. We value your business and are committed to protecting your privacy. We hope you view us as your most trusted advisor and we will work to continue earning your trust and respect.

Please contact us if you have any questions, because your privacy, our professional ethics and the ability to provide you with quality financial services are of the utmost concern to us.

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