**YOUR PRIVACY IS IMPORTANT TO US**

**PRIVACY POLICY & TERMS AND CONDITIONS**

We highly value your trust and confidence in us and want to assure you that your personal information is kept completely confidential by us. We adhere to the highest level of professional ethical responsibility and obligations to protect the confidentiality of your information. While this policy is specifically directed to individuals who inquire about or to whom we provide services for personal or family purposes, we adhere to similar confidentiality standards for our business clients under strict ethical responsibilities.

This Privacy Policy summarizes what information we collect about you, the limited times when we may share it with others, and how we protect your privacy.

**TYPES OF PERSONAL INFORMATION WE COLLECT**

In order to meet your needs in the course of accounting engagements, we collect various types of personal information about you from the following sources:

Information that we receive from you when we meet with you in person or over the telephone, when you send us information by mail or email, or other documents used in preparing financial information or in providing other services to you. Such information may include, for instance, your name, address, birth date, social security number, income and investment sources and amounts, and other tax and financial attributes about you.

Information about your transactions with us, our affiliates, or others. Such information may include, for instance, investment allocations and performance, investment objectives, parties to transactions, account balances, and payment history.

Information we receive from you, or send to you, at your request if you contact us online. We will retain the information you provide us to deliver email messages to you. We may retain the content of your email messages, your email address, and our subsequent response to you.

**PARTIES TO WHOM WE DISCLOSE INFORMATION**

We do not share personal information with third parties without your express consent, except as permitted by law and as described below.

The law permits disclosure in certain circumstances, such as if we must share information to protect against fraud or to protect against credit risk, in response to a court subpoena, and sharing with others who may be assisting us in compliance with professional standards or who assist us in providing tax preparation and other services to you.

We may also share any, or all, of the information we collect, as described above (except for consumer reporting agency information) with nonaffiliated third parties that perform other support and marketing services on our behalf, such as outside data processing and mailings.

For your protection, our agreements with these entities require that they also keep your personal information in the strictest of confidence, just as we do.

**PROTECTING THE CONFIDENTIALITY AND SECURITY OF YOUR PERSONAL INFORMATION**

Keeping your information confidential and secure is of utmost importance to us. We maintain physical, electronic, and procedural safeguards to guard your personal information. In doing so, we restrict access to your personal information to those employees who need to know that information to provide services to you and to the aforementioned support service companies. Those companies are, in turn, legally and contractually bound to maintain the privacy of any information shared with them. Should your status become inactive or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this privacy policy.

**How long we retain your data/Information**

When comments are left on our website or communication via email, that data is kept indefinitely. If you are no longer with our firm, after receiving our “work concluded” letter, we will keep your data on file for 5 years.

**requesting to be removed or requesting information**

You can request to be removed as our client by sending us an email. If you need a copy of your books, we will need a signed release form from your new accounting firm so that we may send it there. If you want information, please also email us a detailed description of what is needed.

Please send all requests to admin@elevatedaccounting.com.

**OUR PLEDGE TO YOU**

Our professional ethical obligations and responsibilities demand the highest regard and duty toward the confidentiality of your personal information and security of your privacy. We will protect your personal information, use it appropriately, and accomplish our engagements with you in such manner as to always maintain your trust and confidence.

**contacting us**

If you have any questions concerning these Terms and Conditions/Privacy Policy, our team or our policies, please contact us at:

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