

# Rumbold Tax Advisory

---

17461 Irvine Boulevard, Suite G ♦ Tustin CA 92780  
Phone: 714-425-7202 ♦ Fax 714-242-1888 ♦ E-mail: jrumbold@rfta.biz

## PRIVACY POLICY- TAX PREPARATION

Your relationship with us is based on trust and confidence. Protecting your privacy is fundamental to this trust. This privacy policy is provided to you as required by law. This privacy policy explains to you the types of information we may collect from you and how we may use or disclose that information.

In the normal course of providing services to clients, we typically obtain certain non-public information about clients such as: name, address, phone number, social security number; information about securities transactions; financial information such as income, assets, net worth, bank account income, and investment account holdings.

As a tax professional we are bound by professional ethics and law to protect the confidentiality of any information provided to us by a client. You deserve to expect that we will protect the information that you have provided in a manner that is safe, secure and professional. We are committed to protecting your privacy and to safeguarding your personal and private information. We never sell or rent any client information about current or former clients – ever. We do not share personal information with any third party unless requested to do so by a client or client representative, or to process a transaction or if permitted by law.

Section 7216 of the Internal Revenue Code requires that we have your consent (opt in) before we disclose your tax return information to affiliates or third parties except the Internal Revenue Service (IRS) and law enforcement officials, and except for certain other lawful purposes.

The Gramm Leach Bliley Act of 1999 requires that we give you the option to prohibit sharing of your nonpublic personal information for use by third parties for marketing purposes. This is referred to as the (opt out) right. However, we do not share your information with third parties except as permitted by the Gramm Leach Bliley Act, nor do we sell or rent your information to third party direct marketers. For this reason, it is not necessary for us to provide you with the opt out.

We do retain client information and correspondence on computers but we use hardware firewall systems, encryption, passwords and other means to protect our computer data from unauthorized access. However, a determined and skilled computer hacker may be able to find a way to gain access to our computers. We maintain backup and archive data on a separate system for recovery in the event of any computer failure or damage. We may maintain client data at remote data centers via the internet for offsite backup purposes. Security for offsite backups uses 128-bit SSL encryption during transport and 448-bit Blowfish encryption on the remote servers.

If you desire that we provide other services to you beyond tax advice or preparation, you will be asked to provide consent under Section 7216 for the sharing of your nonpublic information with affiliates or third parties. Such consent will be limited to matters specified by you.

Some of the information in this Privacy Policy may change from time to time. We will inform continuing and retained clients of any changes as they occur. You are entitled to a new copy of my Privacy Policy at least annually and one will be provided upon request.