

Privacy Policy

It is the policy of Firm Foundation Tax Services to keep all information that we collect from you, confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm, on a need-to-know basis. Each Tax Preparer only has access to the information they need to provide services to their customers. All tax preparers use a unique two factor login to our tax software, and to the My tax Office portal and mobile application. While doing business, we do collect nonpublic personally identifiable information (PII) from the following sources:

- Information that we receive from you when you fill out the Tax Preparation Organizer, worksheets, federal, state, and local tax reporting forms, W2s, IRS transcripts, and other tax related documents you have provided to prepare your tax returns, accounting, bookkeeping, tax planning, or other related services.
- Information about your transactions with FFTS, our affiliates, and partners.
- Information that we may receive from outside agencies such as banks, and brokerage houses. We do not disclose any nonpublic information about our customers, whether past or present, except as permitted, required, or approved by you in writing as listed below.
 - Requirements to comply with federal, state, or local law.
 - Requirements to comply with federal, state, or local licensing rules.
 - Requirements to disclose information in response to law enforcement with warrants or legal subpoenas.
 - Items that you have authorized us to disclose, in writing.
 - Information that you authorize use to disclose when you signed your letter of engagement, to electronically file your tax returns.
 - Information that you authorize us to disclose when you signed your letter of engagement, which discloses that you are our client, with disclosure of financial or other personal information.

I have read, understand, and accept the conditions of the privacy policy and engagement letter as discussed above.

 385-377-5889

 john@firmfoundationtaxservices.com