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## Tax-work Privacy Statement

We take privacy issues very seriously and want you to know that we protect your information.

### **Information Collection**

In order to prepare your tax return we collect nonpublic personal information about you. We collect this from:

- Information on tax documents that you provide to us.
- Worksheets or other financial documents that you provide to us for our use.
- Information we gather through interviewing you.
- Information from outside sources when directed and approved by you.
  - Unless specifically denied by you, we may attempt to obtain tax payment information (e.g., personal property tax such as vehicle license fees, or estimated income tax payments) necessary to ensure an accurate tax return.
  - Unless specifically denied by you, we may attempt to obtain information about an economic stimulus or similar advanced tax refund sent to you if applicable.

### **Information Use**

We use the information we obtain to prepare your tax return consistent with tax laws to the best of our ability. If allowed by a separate signed Consent for Use form, then we may also use your personal information for the uses that you stipulated.

### **Information Disclosure**

We may disclose your nonpublic personal information as stipulated in a separate signed Consent to Disclose form. Otherwise, we do not disclose your nonpublic personal information to any outside person except as required by law or to facilitate the preparation of your tax return. We do not outsource tax returns to another business as a part of our business practice. (Only under the most unusual circumstances would we consider this, and we will not outsource your return without explaining the situation and receiving your specific permission.)

This means that if an outside non-government entity needs a copy of your information, we will assist by providing you with a copy or copies that you may then share. (Depending on the circumstances there may be an additional fee for this service.)

Limited information may be exchanged between us and another non-associated service of your choice provided that you direct us to what kinds of information is to be shared and you sign a separate disclosure agreement authorizing us to share your information. This most often occurs when we are working with you and your outside financial planner or bookkeeper.

### **Information Protection**

We take considerable effort to restrict access to your nonpublic personal information. Guidelines for this are outlined by the Financial Modernization Act of 1999 a.k.a. the Gramm Leach Bliley Act. This includes:

- Physical security to limit access to records.
- Electronic security measures to limit access to your information that is electronically stored.
- Procedures to ensure that the above measures are maintained.

Your privacy is important to you and to us. Please trust that we diligently protect your privacy. If you have any questions about this, please ask us.

This notice may be updated from time to time. Updates are applicable when accepted by you, or 30 days after being sent to your last known address if you fail to notify us that you do not accept the changes.

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Richard Ogg is an Investment Advisor Representative and holds California Insurance License #0G48566.

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Advisory services offered through H.D. Vest Advisory Services<sup>SM</sup>.

The Master's Tax & Financial Services is not a registered broker/dealer or independent investment advisory firm.