



Christopher Rees

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PRIVACY POLICY

I value you as my client, and your privacy is important to me. Please read my privacy policy below.

I collect nonpublic personal information about you from various sources, including the following:

- * Information I receive from interviews regarding your tax situation;
- * Information I receive on applications, organizers, or by other means, such as your name, address, telephone number, social security number, dependents, income, and other tax-related data; and
- * Information from tax-related documents you provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, stock transactions, etc.

I do not disclose any nonpublic personal information about my clients or former clients to anyone, except as requested by my clients, formally and in writing, or as required by law.

I restrict access to nonpublic personal information concerning you, except to employees who need access to such information in order to provide products or services to you. I maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you have any questions about my privacy policy, please contact me.

To affirm that this letter correctly summarizes your understanding of my privacy policy, please sign and return to me a copy of this letter in the space indicated and return it to me before, or at, our first meeting.

I deeply and sincerely appreciate your confidence in me. Please call if you have questions or concerns.

I remain, assuredly and forever,

Your faithful servant,

Christopher Rees

(Both spouses must sign and date for preparation of joint personal returns. **All principals must sign, date, and submit separate copies of this letter for the preparation of non-personal returns [i. e., 1065, 1120S, 1120, 1099, etc.]**)

Accepted By:

Taxpayer _____ Date_____

Spouse _____ Date_____