

## **Advisor Tax Resource Privacy Policy**

Advisor Tax Resource is committed to protecting the privacy and security of our clients' personal information. This Privacy Policy outlines how we collect, use, and disclose personal information in compliance with the Gramm-Leach-Bliley Act (GLBA) and other applicable laws and regulations.

### **Collection of Personal Information**

We may collect personal information about our clients, including but not limited to:

- Name, address, and other contact information
- Social Security number or other government-issued identification number
- Account numbers and other financial information
- Information about transactions and account activity
- We collect this information in order to provide financial products and services to our customers, to comply with legal and regulatory requirements, and for other legitimate business purposes.

### **Use and Disclosure of Personal Information**

We may use and disclose personal information for the following purposes:

- To comply with legal and regulatory requirements
- To prevent fraud and unauthorized transactions
- To communicate with our customers

### **Information Security**

We have implemented physical, administrative, and technical safeguards to protect the confidentiality and security of our customers' personal information. We restrict access to personal information to those employees who need it to provide our products and services.

### **Changes to this Privacy Policy**

We may update this Privacy Policy from time to time. Any material changes will be posted on our website and, where required by law, we will notify our customers by email or other means.

### **Contact Information**

If you have any questions or concerns about this Privacy Policy or our use of your personal information, please contact us at [info@advisortaxresource.com](mailto:info@advisortaxresource.com)

This Privacy Policy was last updated on 3/6/2023