

**Merlak Tax Advisory Group, Inc. Privacy Policy 2024-2025**

Merlak Tax Advisory Group, Inc. is required by law to inform our clients of our policies regarding privacy and client information. We are always committed to protecting your personal information and right to privacy.

**Types of Nonpublic Personal Information We Collect**

We collect nonpublic personal information about you that is provided to us by you or obtained with your authorization. We collect and use this information to service your accounts, complete your tax returns, and/or respond to your requests.

Once Merlak Tax Advisory Group, Inc. obtains your information you will automatically be added to our mailing list, newsletter list, and email list. If you wish to opt out, please initial here \_\_\_\_\_

**Parties to Whom We Disclose Information**

For current and former clients, we do not disclose any non-public personal information obtained during our practice, except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and, in limited situations, to unrelated third parties who need that information to assist us in providing services to you. We may refer this information to an affiliated financial or tax professional where such a referral is thought to be in your interest. Please advise us if instead you would require us to hold all information, including basic directory information, confidential under any circumstance. We restrict access to non-public personal information to those professionals necessary to help you achieve your goals and we maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public information.

Merlak Tax Advisory Group, Inc. will not share any personal data, documents, and/ or tax return information with any parties outside of our office unless it fits the above criteria. It is your responsibility, as the client, to maintain records of all original documents and tax return information along with a copy of your tax return. **With signing this policy, the client understands and agrees Merlak Tax Advisory Group, Inc. is not obligated to supply any duplicate copies of prepared tax returns or information to any parties at any time. Any copies requested of information from Merlak Tax Advisory Group, Inc. records may be subject to a service fee or request may be denied. We will not provide any copies of documents used to prepare tax returns as the originals are returns on delivery or your tax return.**

**How Does Merlak Tax Advisory Group, Inc. Collect Data and How Long Will It Be Stored?**

Whenever we collect personal data in our office via paperwork, during a personal interview or via our website systems, this policy informs you about the extent to which we collect. We will not collect personal data without explicit consent via this signed privacy form. All personal data will normally be stored until it has fulfilled the purpose for which it was collected. However, if a prospective client wishes his/her personal data to be removed from our databases, we will delete that data upon **written request** in accordance with applicable laws.

**Policies Regarding Our Website Systems**

Merlak Tax Advisory Group, Inc. is committed to continuous improvement. We may gather and analyze non-personal data regarding the use of our websites, including domain names, number of hits, pages visited, length of user sessions etc., to evaluate the usefulness of our sites. These numbers are used for statistical purposes only and are not shared with any organizations outside of Merlak Tax Advisory Group, Inc. The personal information gathered may be transferred to areas within Merlak Tax Advisory Group, Inc. and will not be shared with any organizations outside of Merlak Tax Advisory Group, Inc., except permitted by law. It will only be used according to the purpose described on the respective page where the data is collected. We will not share personal information.

**Keeping Up to Date with Our Privacy Policy**

As required by law, Merlak Tax Advisory Group, Inc. will provide notice of our policy annually if you maintain an ongoing relationship with us. To receive a copy of the most up to date Privacy Policy, call us at (779)220-9608. If we may make changes to this policy at any time and will inform you of changes as required by law.

**Confidentiality and Security**

Our employees are required to follow procedures with respect to maintaining the confidentiality of our clients' non-public personal information.

If at any time you are not satisfied with our procedures to protect your privacy, or if you have questions regarding the collecting and/or use of your personal data, please contact us. We will use all reasonable efforts to promptly address your concern. Your privacy, our professional ethics and the ability to provide you with quality tax preparation and retirement planning services are very important to us.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Consent to Use of Tax Return Information**

Federal law requires this consent form to be provided to you (the taxpayer). Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for one year. If you do not consent, then you may still have your tax return prepared and electronically filed by us for a \$189.00 fee.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of your 2024 tax return to determine whether to present you with the opportunity to apply for other products and services.

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).