

Jeb Williamson CPA LLC Privacy Policy

Like all providers of personal financial services, tax professionals are required by law to inform clients of their policies regarding privacy of client information. Our firm continues to adhere to professional standards of confidentiality that are even more stringent than those required by law. We have always protected the security and privacy of your personal and financial information.

Types of Nonpublic Personal Information We Collect

The only nonpublic personal information we collect is provided to us by you or obtained with your authorization.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures may include providing information to our employee team members, or, in limited situations, to unrelated third parties who need that information to assist us in serving you. In all situations, we stress the confidential nature of the information being shared. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. Your consent is obtained by your signing of the Consent to Disclosure of Tax Return Information form and this form is typically used to allow our firm to release information to your bank/mortgage lender, financial advisor, attorney, successor accountant/tax preparer, etc.

Protecting the Confidentiality and Security of Clients' Information

We retain records relating to our professional services to better serve your professional needs and, in some cases, to comply with professional guidelines. In order to protect your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

If you wish to discuss our privacy policy, please give us a call at 256-734-7393. All financial companies need to share customers' personal information to run their

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everyday business. In the sections below, we list the reasons financial companies can share their customers' personal information; the reasons Jeb Williamson CPA LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information include:

- For our everyday business purposes—such as to process your transactions, maintain your account(s), or respond to court orders and legal investigations
- For our marketing purposes—to offer our products and services to you
- For our affiliates to market to you

We do not disclose any nonpublic information about our customers or former customers to anyone, except as permitted by law. We restrict access to nonpublic personal information about you to those members of our firm and affiliated companies who need to know that information to provide services to you. We maintain physical, electronic and procedural safeguards to guard your nonpublic personal information.

To limit our sharing your information, please call us at 256-734-7393. Please note: If you are a new customer, we can begin sharing your information 1 day from the date you receive this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Frequently Asked Questions

1. Who are we?

Jeb Williamson CPA LLC is an accounting firm located in Cullman, Alabama and formed in October 2004. We provide a wide variety of accounting and financial services for both individuals and businesses, including accounting/bookkeeping,

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payroll, financial statement preparation, tax form preparation, and financial/retirement/tax planning.

2. How does Jeb Williamson CPA LLC protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

3. How does Jeb Williamson CPA LLC collect my personal information?

We collect your personal information, for example, when you provide information for tax return, payroll, or financial statement preparation or other financial matters.

4. Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

5. What happens when I limit sharing for an account I hold jointly with someone else?

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Your choices will apply to everyone on your account—unless you tell us otherwise.