

## The Income Tax Planning Network

### Privacy Policy Statement

When meeting the requirements of the Gramm-Leach Bliley Act of 1999, (The Gramm-Leach-Bliley Act (GLB Act or GLBA), also known as the Financial Modernization Act of 1999, is a federal law enacted in the United States to control the ways that financial institutions deal with the private information of individuals. The Act consists of three sections: The Financial Privacy Rule, which regulates the collection and disclosure of private financial information; the Safeguards Rule, which stipulates that financial institutions must implement security programs to protect such information; and the Pretexting provisions, which prohibit the practice of pretexting (accessing private information using false pretenses). The Act also requires financial institutions to give customers written privacy notices that explain their information-sharing practices) our firm is contacting you in this letter to make you aware of the privacy of the firm.

It is the policy of this office to handle all information that you will provide us with the utmost **Confidentiality and Care**. This office will restrict access to nonpublic personal information about any of our clients to members of this firm who need to know, and this will only happen if they need to know any information in order to complete the work that you have hired this firm to do. This firm will not disclose any of your personal and confidential information to anyone outside of this firm without your express written permission to do so.

If you cannot pick up any work that you have hired this firm to complete for you, you must give that person a written note. If the person does not have permission in writing, they will not receive your paperwork.

This firm maintains physical, electronic and procedural safeguards that will comply with the Federal Regulation to safeguard your personal information.

Thank You;

A handwritten signature in cursive script that reads "Karla Gerrard".

Karla Gerrard