Please note this disclosure notice that we are required by law to provide to each client regarding the privacy policy of our firm as of January 2010.

Patrick & Robinson, LLC *Privacy* Policy

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your 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 by us with your authorization. This information is collected by interviews with you; written communication with you, including by email; and prior tax returns or organizers, either provided by you or provided by others with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice, except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in very limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Authorization for Direct Disclosure to Third Parties

We often receive requests to supply your personal data to third parties. To protect the confidentiality of your data, we require a specific authorization from you to release that data. Authorization can come by telephone, in person, on paper, or by email. Documents related to your personal file must be given release directly from that individual.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

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Please do not hesitate to call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

4029 Atlantic Blvd., Jacksonville, FL 32207
P: 904-396-5400; F: 904-396-9226; Office@CPAsite.com