

## Melissa's Administrative Services

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### Privacy Policy

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies. Below is the policy of MAS:

MAS handles all information with confidentiality. Any personal information will only be shared with members of our firm, on a need-to-know basis, for the purpose of completing your return. MAS will not disclose your personal information to anyone outside our firm without your written permission or unless we are legally required. The preference is to provide *you* with any information requested by a third party and allow you to deliver it.

MAS restricts access to your personal information to those professionals necessary to the functioning of our firm. For example, tax preparation software providers have access to your tax information in order to e-file your returns or troubleshoot software issues.

MAS maintains physical, electronic, and procedural safeguards for your non-public personal information.

Please be aware that anything you disclose during your tax interview is confidential, however, it is not protected from the IRS. Privileged communications (*those that are protected from IRS authority to compel our testimony*) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although we may consider any information you provide us as confidential, return preparation engagements are not covered by advisor-client privilege. If you feel the nature of any subject matter to be discussed requires protected communications, please let us know so we can discuss the possibility of the need for consult with an attorney for legal advice.