

AccuBooks Tax
Elizabeth O'Donnell, EA

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

Types of Nonpublic Personal Information I Collect

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

Parties to Whom I Disclose Information

I do not disclose any nonpublic personal information obtained in the course of my practice except as required or permitted by law. Permitted disclosures may include providing information to my employees, or, in limited situations, to unrelated third parties who need that information to assist me in serving you. In all situations, I stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Clients' Information

I retain records relating to my 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, I maintain physical, electronic, and procedural safeguards that comply with my professional standards.

If you wish to discuss my privacy policy, please give me a call at 805.668.3250.