

Colorado CPA Company PC

Privacy Statement

Last updated May 2021

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To our valued clients:

Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. Although CPA firms are no longer subject to the notice requirements of the Gramm-Leach-Bliley Act (“GLBA”), we believe in good business practice and therefore are disclosing our Privacy Policy to you. This Privacy Statement explains the types of information we collect via our website and through other interactions with you, and how we use, share, and protect this information and your rights regarding your personal information.

FACTS What does Colorado CPA Company PC do with your personal information?

Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- Account balances and payment history
- Other financial data

When you are no longer our customer, we continue to share your information as described in this notice.

How?

All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons Colorado CPA Company PC chooses to share; and whether you can limit this sharing.

Who we are

Who is providing this notice? Colorado CPA Company PC

What we do

How does Colorado CPA Company PC 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.

How does Colorado CPA Company PC collect my personal information?

We collect your personal information, for example, when you

- Open a new client account
- Provide source documentation related to our services

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Reasons we can share your personal information	Does Colorado CPA Company PC share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus as required	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	No
For nonaffiliates to market to you	No	No

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.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Contact Us

If you have any questions or concerns regarding this Privacy Statement or your personal information, please contact (720) 722-5835 or by mail at PO Box 630154, Highlands Ranch, CO 80163