

# Clement & Associates, CPA

## Privacy Policy & Request to Send Documents to a Third Party

It is the policy of Clement & Associates to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation of other financial and related services.
- Information about your transactions with us and others.
- Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required by law, or approved by you in writing as listed below:

- Requirements to comply with Federal, State, or local law.
- Requirements to comply with National, State, or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information which you authorize us to disclose by signing this engagement letter and to electronically file your tax return when applicable.
- Information which you authorize us to disclose by signing this engagement letter that discloses that you are our client, without disclosure of financial or other personal information.

We are required to remove Social Security numbers from all documents, unless required to be reported (i.e. tax returns, loan documents).

If you need to request that we fax or email a copy of your tax return(s) or any other data about you to another party (i.e. mortgage lender), we will require your permission in writing. Please fax or email to us your signed authorization to release the information to (818)332-4294. You may wish to use the following:

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To: Clement & Associates, CPA:

Date: \_\_\_\_\_

From: \_\_\_\_\_ Signature: \_\_\_\_\_  
(Please Print)

From: \_\_\_\_\_ Signature: \_\_\_\_\_  
(Please Print)

Please fax, email, or mail a copy of either

1. Mortgage lender letter or 2. Tax return(s) to: \_\_\_\_\_

Attention: \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

Email address: \_\_\_\_\_ Year(s) of return(s): \_\_\_\_\_

Address: \_\_\_\_\_