

# PETER MARSHALL & COMPANY, P.C.

*Certified Public Accountants*

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## **PRIVACY POLICY**

At Peter Marshall & Company, your privacy is important to us. As a registered Texas CPA firm, we have a duty of client confidentiality that is stricter and carries more sanctions than the Gramm-Leach-Bliley Act that covers most other businesses. We adhere to the Rules of Professional Conduct on client confidentiality as published by the Texas State Board of Public Accountancy.

### **Personal Information We Collect**

In order to provide services to you, we collect nonpublic personal information about you that is provided to us by you or obtained with your authorization from third parties. The categories of personal information we collect include the following:

- Personal identification information such as name, address, social security numbers, and names of family members
- Financial information such as current and prior year tax returns, assets, income, investments, account balances, and credit or debit card usage
- Information we may receive from a consumer reporting agency

### **Parties to Whom We Disclose Information**

We do not disclose any nonpublic personal information obtained in the course of our practice except as required by law. Within our firm, we provide access to your personal information only to those employees who need to know the information to provide you with our services. We maintain physical, electronic and procedural safeguards to protect your personal information.

*We do not share your personal information with companies that provide marketing services.*