

Client Privacy Notice

TAX YEAR 2026 | 2027 FILING SEASON | DRAFT FOR REVIEW

Client name: _____ Date: _____

Draft notice for owner review. We collect information needed to prepare returns, communicate with clients and meet legal obligations. Information may include identification, household, income, expense and financial records. Disclosure must be limited to legally permitted purposes or separately authorized where required. Do not send confidential records by ordinary email or text. Use only the approved secure channel. The firm must confirm its actual safeguards, service providers, retention and disposal practices before issuing this notice. Acknowledgment of receipt is not consent to disclose or use tax return information for unrelated purposes.

Firm privacy contact (owner to complete)

Retention and disposal policy (owner to complete)

Applicable service providers and safeguards (owner to complete)

Client questions

Client signature: _____ Date: _____

Spouse signature (if applicable): _____ Date: _____