



Privacy Policy of The Pearl Agency, LLC.

Bookkeeping professionals have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy. Like most bookkeeping firms, we maintain data which our clients supply to us or authorize us to obtain from third-parties so that we may prepare their tax returns and advise them on tax and financial planning issues.

As a general policy, we only maintain this data for seven years; however, certain information (such as the tax basis for capital assets, as well as prior year's tax returns) may be retained for longer periods. Because of the confidentiality requirements of the bookkeeping profession, we do not share with persons outside our firm any information which you may supply to us or authorize us to obtain from third-parties. We do, however, share such information with individuals within our firm so that we can offer you our full range of professional services.

Notwithstanding this policy, we may be required to disclose your confidential information:

- To third-parties with which you have authorized us to disclose this information;
- To governmental agencies (such as federal and state taxing authorities) in representation of your interests;
- To a service bureau that assists us in providing services for you;
- To the individuals who conduct our triennial peer reviews;
- To state or federal regulatory authorities which oversee the accounting profession;
- To comply with lawfully issued subpoenas or court orders.

Be advised that from time to time, we are approached by non-affiliated third-parties inquiring whether any of our clients might be interested in effecting a given type of transaction or purchasing their goods or services. It is our policy not to provide any confidential information about you to such persons without your express consent. If you have any questions about our policies designed to protect the privacy of your confidential information, please call your agency contact.