



Ryan C. Blair, CPA, PLLC
— Taxes • Bookkeeping • Payroll —

PRIVACY POLICY

At Ryan C. Blair, CPA, PLLC (**RCB**), we value your trust and confidence in us and want to assure you that your personal information is kept completely confidential by us. RCB adheres to the highest level of professional ethical responsibility and obligations to protect the confidentiality of your information. RCB restricts access to nonpublic personal information to what is necessary to tax, bookkeeping, and payroll services. RCB maintains electronic, physical, and procedural safeguards to guard clients' nonpublic personal information.

TYPES OF INFORMATION WE COLLECT

We collect nonpublic personal information about you that is provided by you to provide our services. Examples of sources from which we collect information:

Electronic Documentation, Physical Copies and Client Interviews

To provide our services, we receive information from you. This information is collected from you electronically through our client portal, physical copies of written documentation, by email, by mail, by telephone and in personal or virtual interviews and consultations conducted by RCB.

Transaction Information

The information about your transactions with us includes information necessary for billing and payment for the services we provide, as well as all correspondence between you and RCB. Transaction information would also include your payment history with us, billing records, and any collection effort engaged in by us for payment of services rendered to you. Credit card details for prior payments are **not** stored on our website or Dropbox (our client portal and paperless office software).

PRIVACY POLICY

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies. Here is our policy:

We handle all information you provide to us with the utmost confidentiality. Your personal information will only be shared with members of RCB who need to know this information to complete the work you have engaged us to perform. We will not disclose your personal information to anyone outside RCB without your express written permission to do so, or unless we are legally required to do so.

We also maintain electronic, physical and procedural safeguards in compliance with applicable laws and regulations to guard your nonpublic information. Please see our Security Policies and Procedures for a more detailed explanation of our safeguards.

NOTICE REGARDING ADVISOR-CLIENT PRIVILEGED COMMUNICATIONS

As tax preparers, we are prohibited by Internal Revenue Code Section 7216 from disclosing your income tax return information without your consent, other than for the specific purpose of preparing, or obtaining and providing services in connection with the preparation of an income tax return for you.

You should also be aware that anything you tell us during the interview for the preparation of your tax return is confidential, but not protected from the IRS. Privileged communications (those that are protected from IRS authority to compel our testimony) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although we consider any information you provide us as confidential, return preparation engagements are not covered by advisor-client privilege.

If you feel the nature of any subject matter to be discussed requires protected communications, please raise that issue so that we can discuss your possible need to consult with an attorney for legal advice.

RCB WEBSITE

RCB uses a third-party analytics tool to collect information about the use of this site, including the frequency of visits, the number of visits on each page, and how users found the RCB website. We only use this information to improve the site. This information is collected through the use of cookies, although the cookies are not required for site functionality. Your IP address is collected as part of this analytics software and used to provide certain data points, but your IP address itself is masked and not revealed to anyone at RCB.

Information collected through forms on this website will only be used to provide a service to you and personal information will not be sold or disbursed to parties outside of RCB without your consent.

CHOICE/OPT-OUT

We give users the opportunity to opt-out of receiving communications from RCB at any time. The following options are available for removing your information from our database, so as not to receive future communications or to no longer use our services.

1. You can send an email to info@ryanblaircpa.com
2. You can call us at (828) 264-5500

NOTIFICATION OF CHANGES

This policy may be revised over time as new features are added to our website. We will post those changes prominently so that you will always know what information we gather, how we might use that information, and whether we will disclose it to anyone. Please check our website for information about revisions to our privacy policy.

LINKS TO OTHER WEBSITES

The RCB website contains links to other websites. This privacy statement is for the sole use and purpose of the RCB website. Please be aware that RCB is not responsible for the privacy practices of other websites. We encourage you to read the privacy statements on each website that collects your personally identifiable information.

CONTACTING US

If you have any questions about our Privacy Policy, Security Policy and Procedures or information on our website, please contact us at info@ryanblaircpa.com or (828) 264-5500.