



PRIVACY POLICY

Effective Date: September 6, 2026

Tailored Accounting Services ("Tailored Accounting Services," "we," "us," or "our") respects your privacy and is committed to protecting the personal information entrusted to us. This Privacy Policy explains how we collect, use, disclose, and protect information obtained through our website and in connection with our accounting, tax preparation, bookkeeping, tax advisory, and related professional services.

Information We Collect

We may collect personal information that you voluntarily provide to us, including:

- Name
- Email address
- Telephone number
- Mailing address
- Information submitted through website contact forms
- Information provided when scheduling an appointment or requesting services
- Business and financial information
- Tax documents and tax return information
- Social Security numbers, taxpayer identification numbers, dates of birth, and other information necessary to provide tax or accounting services
- Accounting records, payroll information, bank information, and supporting documentation
- Payment and billing information
- Communications and documents exchanged with us

We may also automatically receive certain information when you visit our website, such as your IP address, browser type, device information, referring website, pages viewed, approximate location, and information about how you interact with our website.

How We Use Information

We may use information we collect to:

- Respond to inquiries and communicate with prospective and existing clients
- Provide tax preparation, accounting, bookkeeping, advisory, and related professional services
- Prepare and file tax returns and other required filings
- Maintain client records
- Schedule appointments
- Process payments and manage billing
- Operate, maintain, secure, and improve our website and services
- Measure the effectiveness of our advertising and marketing
- Detect or prevent fraud, unauthorized access, and other security incidents
- Comply with legal, regulatory, professional, and recordkeeping requirements
- Protect our rights and the rights of our clients

Tax Return Information

Federal law provides special protections for information obtained in connection with the preparation of tax returns.

Tailored Accounting Services does not use or disclose tax return information except as permitted by applicable law or when the taxpayer has provided any consent required by law.

When applicable law requires a specific consent before tax return information may be used or disclosed, acceptance of this Privacy Policy does not replace that consent.

Cookies and Online Tracking Technologies

Our website may use cookies, pixels, tags, and similar technologies to operate the website, understand website traffic, measure advertising performance, and improve our services.

We may use Google advertising and measurement technologies, including Google tags, in connection with our advertising campaigns. These technologies may collect information such as device and browser information, IP address, website activity, advertising identifiers, and interactions with our advertisements or website.

We may also use technologies provided by our website hosting platform and other third-party service providers for website functionality, analytics, security, and performance.

You can control or delete many cookies through your browser settings. Restricting certain cookies may affect the functionality of the website.

Where required by applicable law, we will obtain consent before using cookies or similar technologies for purposes that require consent.

How We Share Information

We may disclose information to third parties when reasonably necessary to operate our business, provide requested services, or comply with applicable legal requirements.

These parties may include:

- Website hosting and technology providers
- Secure client portal providers
- Tax preparation and accounting software providers
- Cloud storage and document-management providers
- Appointment scheduling providers
- Payment processors
- Email and communications providers
- Information technology and cybersecurity providers
- Professional advisors, including attorneys and accountants
- Government agencies and taxing authorities when required or authorized
- Other service providers that assist us in providing requested services

Service providers may receive information as reasonably necessary to perform services on our behalf and are expected to handle that information appropriately.

We may also disclose information when required by law, court order, subpoena, regulatory requirement, or other legal process, or when reasonably necessary to protect our rights, prevent fraud, investigate security incidents, or protect another person.

We do not sell client tax return information.

Data Security

Because our services involve sensitive financial and tax information, we use reasonable administrative, technical, and physical safeguards designed to protect personal information against unauthorized access, loss, misuse, alteration, or disclosure.

However, no method of electronic transmission or storage can be guaranteed to be completely secure. Accordingly, we cannot guarantee the absolute security of information transmitted electronically.

Clients and prospective clients should avoid transmitting sensitive financial, tax, or identity information through ordinary website contact forms or unsecured email when a secure method of transmission is available.

Data Retention

We retain personal information for as long as reasonably necessary to provide services, maintain appropriate business and professional records, comply with tax, accounting, legal, regulatory, and professional obligations, resolve disputes, and enforce agreements.

Information that is no longer required may be deleted, destroyed, anonymized, or otherwise disposed of in accordance with our record-retention and information-security practices.

Your Privacy Choices

Depending on where you reside and the laws applicable to Tailored Accounting Services, you may have certain rights regarding your personal information, including the right to request access to, correction of, or deletion of certain information.

Not all rights apply in every circumstance. We may be required or permitted to retain certain information because of tax, accounting, legal, regulatory, professional, contractual, or recordkeeping requirements.

You may contact us to submit a privacy-related request.

Third-Party Websites and Services

Our website may contain links to websites or services operated by third parties. We are not responsible for the privacy, security, or content practices of third-party websites or services.

We encourage you to review the privacy policies of third-party services before providing personal information to them.

Children's and Minors' Privacy

Our website and professional services are intended for adults and are not directed to individuals under the age of 18.

We do not knowingly collect personal information directly from individuals under 18 through our website. If we learn that we have collected personal information from a minor without appropriate authorization, we will take reasonable steps to delete the information when appropriate.

Information regarding a minor may nevertheless be provided to us by a parent, legal guardian, taxpayer, or other authorized individual when reasonably necessary for tax preparation, accounting, or related professional services.

Changes to This Privacy Policy

We may update this Privacy Policy periodically to reflect changes in our business practices, technology, services, or legal requirements.

When this Privacy Policy is updated, the revised effective date will be posted at the top of this page.

Contact Us

If you have questions about this Privacy Policy, wish to make a privacy-related request, or have questions about how Tailored Accounting Services handles personal information, please contact us using the contact information provided on our website.

Tailored Accounting Services

www.tailoredaccountingservices.com