

Matonis, Peck & Wurst, LLC

Enrolled Agents - Public Accountants

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To: Clients of Paul Matonis

Our Privacy Policy

Thank you for the opportunity to assist you with your tax and accounting needs. We understand that we have very valuable personal and financial information of yours. We are constantly reviewing our policies and procedures to protect the personal and financial information you have entrusted us with.

We do not disclose any non-public personal or financial information about our clients or former clients to anyone, except as instructed to do so by the client. We restrict access to non-public personal and financial information to those professionals necessary to assist our clients in attaining such things as home loans, business loans, student loans, etc. We maintain physical, electronic and procedural safeguards to guard your non-public personal and financial information. All income tax & accounting preparation work is done in our office so the only time your information leaves our office is when we e-file the reports to the government as required by law and when we return the information to you.

Sincerely,

Paul T Matonis, EA, ABA

Note: Prior to 2008 we were required to provide all of our clients with a letter stating our privacy policy and it needed to have most of this information included in the letter. I decided to transfer it to the bottom of the letter so you would realize the only change is a copy of our privacy policy is not required but available upon request.

Notice of Privacy Policy/Gramm-Leach-Bliley Act that requires all financial institutions, tax preparers and accountants that prepare income tax returns to send a notice explaining their privacy policies to customers. This is new legislation that requires us to notify our current clients. We have always followed these procedures and safeguards to insure your confidentiality. We will be required to send a copy of our written policy on an annual basis.

*Enrolled Agent - federally licenses to practice before the Internal Revenue Service
Accredited Business Accountant - specializing in the needs of small businesses*