

Client Information Privacy Policies

Confidentiality

You may have some concern about the confidentiality of the information you provide to our office. It is our policy to keep your personal and business matters strictly confidential to the extent permitted by law.

Advisor-Client Privileged Communications

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies. Following is the policy of Norwalk Business Service, Inc.

Norwalk Business Service, Inc. handles all information you provide to us with the utmost confidentiality. Your personal information will be shared only with members of our firm who need to know this information in order to complete the work you have hired Norwalk Business Service, Inc. to do. We will not disclose your personal information to anyone outside of Norwalk Business Service, Inc. without your express written permission to do so, or unless we are legally required to do so. For example; if a mortgage lender contacts our office for a copy of your tax return or information about it, we will ask that you (our client) provide written authorization prior to our responding to that request. From time to time we may send you information from our other business partners that we think might fit your needs. If you do not wish to be on those lists, please send our office a written request.

You should also be aware that anything you tell us during the interview for the preparation of your tax return is confidential, but is 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 to 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 require protected communication, please raise that issue so that we can discuss your possible need to consult with an attorney for legal advice.

Referrals are welcome

Referrals are the cornerstone of all service businesses. Norwalk Business Service, Inc., like other professional service firms, relies on satisfied clients as the primary source for new business. Your referrals are both welcome and most sincerely appreciated!

When you refer clients to us, you are expressing your faith and confidence in the services Norwalk Business Service, Inc. has and will continue to provide to you.

Since your referrals are generally individuals you are well acquainted with, you can be assured that your personal, financial and tax data will not be shared with them.

An Expression of Confidence

You may have business associates who need professional tax assistance or family and friends who struggle to do their own taxes every year. No matter who you refer, be assured that their individual tax needs will be treated in the same professional manner that yours has been.

Thank you for allowing Norwalk Business Service, Inc. to be of service to you.