Privacy Policy

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. This Privacy Policy describes the ways in which your personal data is collected and used by Schear & Schear.

Types of nonpublic information we collect:

We collect certain personal information about you – but only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your personal income tax returns and may also provide various tax and tax planning services to you at your request.

Examples of sources from which we collect information include:

* Interviews and phone calls with you
* Letters or e-mails from you
* Tax return or financial planning organizers
* Tax documents

Parties to whom we disclose information:

As a general rule, we do not disclose personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

* To comply with a validly issued and enforceable subpoena or summons.
* In the course of a review of our firm’s practices under the authorization of a state or national licensing board, or as necessary to properly respond to any inquiry or complaint from such a licensing board or organization.
* To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside service bureau to process tax returns or engaging a records-retention agency to store prior year records.)

Protecting the confidentiality and security of current and former clients’ information:

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. We electronically send data through our secure portal whenever it has your personal data, such as a tax return. We also use two factor authentication or internal software whenever possible.

Please call me at (513) 984-5700 if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.