



## **Privacy Policy Statement of Mark Cross Tax Services, Inc**

as required by the

### **Gramm-Leach-Bliley Act, Public Law 106-102**

Effective November 12, 1999

Mark Cross Tax Services, Inc. collects nonpublic personal information about you, and your family, if applicable, in order to properly prepare and complete your tax returns, from the following sources:

- Information received from you on applications, worksheets, client organizers, and other intake documents whether submitted by you or completed on your behalf such as your name, address, telephone number, social security number, dependents, income, etc.
- Information about your history with us and/or other firms offering similar services.
- Information from a consumer reporting agency in accordance with tax related products.
- Information needed to prepare tax returns and/or to assist you with financial and tax advice such as W2s, 1099s, 1099Rs, 1099INTs, 1099DIVs, bank, mortgage, retirement, and financial statements, etc.

Mark Cross Tax Services, Inc. will not disclose any of your nonpublic personal information to anyone, unless authorized by you or except as permitted by law:

- Requirements to comply with any federal, state, or local licensing rules or laws.
- Requirements to disclose information in response to legal subpoenas.
- Items you specifically permit or request us to disclose, as authorized by you in writing.

Mark Cross Tax Services, Inc. restricts access to your public and nonpublic personal information, including your account information, to those employees and partnered companies who need to know that information to provide products and/or services requested by you.

Mark Cross Tax Services, Inc. will adhere to the privacy policies and practices as noted above if you are a current, previous, or inactive customer.

Mark Cross Tax Services, Inc. maintains physical, electronic, and procedural safeguards that comply with the federal standards to guard your nonpublic personal information. Backup copies of personal information are maintained in nonpublic areas, electronically and physically.

We know that you have confidence in our ability to perform the services requested by you. Equally important to us is your confidence in knowing that all your personal information is safe.

Please contact us at 407-944-4242 if you have any questions or concerns regarding our policy.

Thank you.