

Alegria & Company, P.S. Privacy Policy

Certified public accountants, 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. Therefore, we have always protected your right to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as expressly authorized by you or as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

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. We return to our clients all original documents delivered to us. We generally make file copies of pertinent documents for our records. We typically retain our files for a maximum period of seven (7) years. This retention period may be longer when warranted by circumstances such as continuing client relationships, professional standards, or applicable laws. In order to guard your nonpublic personal information, we maintain physical, electronic and procedural safeguards that comply with our professional standards.

Please call (509) 575-1065 if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.