



Privacy Policy

Protecting the privacy and confidentiality of information about our clients is vitally important to Granite Point Tax Group, LLC. Please review our Privacy Policy carefully and contact us with any questions or concerns.

Types of Information We Collect

We collect certain non-public 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 use it to provide various tax and financial planning related 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 organizers*

Parties to Whom We Disclose Information

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

- 1. To comply with a validity issue and enforceable subpoena or summons.*
- 2. To aid in the collection of delinquent accounts we may provide name, address, Social Security Number, and current balance due to a third party collection agency.*
- 3. With your signed written permission, we may provide tax forms or other confidential documents to financial brokers, banks, or other third parties designated by you.*

Confidentiality and Security of Nonpublic Personal Information

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to employees of our firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our firm, applicable law, our Code of Professional Conduct, and non-disclosure agreements where appropriate. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.

Note: If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484 or by email at complaints@tigta.treas.gov.