



SAGACITY

TAX & ACCOUNTING

SAGACITY TAX & ACCOUNTING PRIVACY DISCLOSURE

Client Tax Information is Confidential

Tax returns and tax return information are confidential and may not be disclosed to federal or state agencies, or to federal or state employees, or to any third party, except as provided by law. Disclosure of tax return information to federal or state agencies or employees is governed by Internal Revenue Code Section 6103.

Confidential tax return information includes the following elements: the taxpayer's identity, the nature, source or amount of income, payments, receipts, deductions, net worth, tax liability, deficiencies, closing agreements, and information regarding actual or possible investigation of a return.

Types of Nonpublic Personal Information Sagacity Tax & Accounting Collects

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

Parties to Whom Sagacity Tax & Accounting Discloses Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosure includes providing information to our employees.

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 to comply with federal and state laws regarding retaining tax returns. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards.

We do not share any of your confidential tax return information with any third-party. A third-party is any person or company other than you, the client. That means we cannot disclose your identity, income, net worth, tax liabilities, or other protected information to the Internal Revenue Service, state tax authorities, unmarried partners, friends, relatives, real estate agents, mortgage brokers, banks, or any other person or company without your explicit authorization.

How to Authorize Disclosure

You may authorize us to disclose certain tax return information to third parties of your choice. Your permission must be obtained on IRS Form 8821 Tax Information Authorization.