CHRISTINE KRIEGER
Taxes & More

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Privacy Policy

Enrolled Agents, like all providers of personal financial services, are required to inform their clients of their policies regarding the privacy of client information. Enrolled Agents are bound by professional standards of confidentiality that are required by the IRS and outlined in Circular 230. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return.

However, your communications with Enrolled Agents & CPAs do not enjoy the same privileges as attorney-client privilege. ***The Sec 7525 privilege applies only to civil administrative proceedings with the IRS (e.g., examinations, appeals) or before the Tax Court or other federal courts****. It does not apply during state or local tax matters, any nontax proceedings, or criminal investigations.*

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information essential to prepare your tax return that is either provided to us by you or obtained by us with your authorization (For instance W-2, 1099 Investment statement, etcetera)

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any non-public personal information obtained during our practice except as required or permitted by law. Permitted disclosure includes, for example, providing information to our employees. In certain circumstances, we will ask you for an IRS Power of Attorney (Form 2848) in order to communicate with the IRS on your behalf. Confidential communication with other parties (e.g., your Financial Advisor) will require your written permission.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to our professional services for up to seven years.

We retain documents you provided to us which show federal or state tax withholdings.

To guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards (alarm system, locking metal filing cabinets, password and encryption protection, restricted access to physical & electronic data). We encourage you to further protect your identity on your personal devices.

IRS publication 4524 outlines simple steps that help you keep your computer secure, avoid phishing and malware, and protect your personal information.

Please call or email us if you have any questions or concerns.
Your privacy and our professional ethics are important to us.