



## Delisi & Associates, P.C.

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### Delisi & Associates, P.C. Privacy Policy

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 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. Exceptions to the nondisclosure rule apply to practicing firms:

1. To effect or administer the transaction requested by the client; for example, disclosure to a tax return processor (our software vendor is Lacerte) for purposes of preparing your return and electronic filing transmissions.
2. To participate in a peer review (by another CPA firm).
3. To comply with Federal, State, or Local laws; for example, in response to a summons or subpoena.

Any disclosures of nonpublic personal information other than the noted exceptions will require your approval either verbally or in writing.

#### 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. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards and comply with our professional standards.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Delisi & Associates, P.C.  
September 27, 2011