

**SMALL BUSINESS FINANCIAL SOLUTIONS
503 HORSHAM ROAD
HORSHAM, PA 19044**

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PRIVACY POLICY NOTICE

The privacy of our client information has always been important to us, and we have always been bound by professional standards of confidentiality. However, we are required by law to formally inform our clients of our privacy policy.

In the course of providing our clients with tax preparation, planning, estimating and compliance services, consulting, accounting, payroll tax services, investment management services, mortgage services, insurance services, and other services, with the authorization of our clients, we collect nonpublic personal and financial information from our clients and in some cases from third parties. We collect nonpublic personal and financial information from our clients on tax organizers, questionnaires, agreements and other forms. All nonpublic personal and financial information concerning our clients and former clients is held in confidence and is not released to people outside our firm, except as agreed to by our clients or as required or permitted by law or when necessary to process transaction requested by our clients. We restrict access to nonpublic information about our clients to members of our firm who need to know that information in order to provide professional services to our clients.

We retain records relating to professional services that we provide so that we are better able to assist our clients with their professional needs and, in some cases to comply with professional guidelines and laws. We maintain physical, electronic, and procedural safeguards that comply with our professional standards to guard our clients' nonpublic personal and financial information.

The confidence and trust of our clients is very important to us. If you have any questions or concerns regarding the privacy of your nonpublic personal or financial information, please contact us.