



## **NFS Tax Prep, Inc. Privacy Policy**

Neubert Financial Services provides excellence in the delivery of financial services to individuals and businesses. In providing these services, maintaining your privacy is of vital importance to us. We know that keeping your personal information private is important to you. That's why Neubert Financial Services wants you to know how we protect the information you share with us.

### ***We Do Not Sell Your Personal Information to Anyone***

At Neubert Financial Services, we do not sell any of our clients' non-public personal information. We value the trust provided to us and believe the undisclosed sharing of personal information with another individual or company would be a violation of this trust. We pledge to maintain this privacy of your information. We may disclose the information we collect about you when required by law, such as to:

- Respond to a subpoena;
- Prevent fraud;
- Comply with legal requirements; or
- Respond to a government inquiry.

### ***Type of Information Collected***

The personal information we collect about you is for the purpose of servicing your financial needs. This information is collected on applications or other forms supplied by us or unaffiliated companies in order to provide these financial services. Neubert Financial Services does not disclose non-public personal information about you or our former clients to any non-affiliated parties, except as permitted by law. This permitted disclosure may include providing information to companies that perform support services on your behalf or to other firms that assist us in providing you with products and services. Examples of these companies may include funds, stock transfer agents, banks, lawyers, and insurance providers. This information will not be disclosed without your approval.

### ***Our Privacy Procedures***

We restrict access to your non-public personal information to those employees who need to know that information to provide products or services to you. As a condition of employment, we require individuals to sign a non-disclosure agreement to prevent dissemination of your private information.

We maintain physical, electronic, and procedural safeguards that comply with applicable regulations to safeguard your non-public personal and financial information. Neubert Financial Services retains the information collected for as long as required by law or regulation.

### ***We Will Provide Our Privacy Policy to Our Clients***

Neubert Financial Services will distribute a copy of our privacy policy to our clients on an annual basis.

We value client relationships. Protecting your privacy is a core value for us in building a long-lasting and trusting relationship.

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