

CMW Financial, Inc. Privacy Statement for Tax Customers

Protecting the privacy of our tax clientele is fundamental to our business at CMW Financial, Inc. We maintain physical, electronic, and procedural safeguards to protect tax clientele information. This privacy policy explains the types of information we may collect from you, and informs you how we use that information.

Information We Collect

- Our personnel collect personal information from you in order to prepare your tax return. This information, referred to in this policy as "tax return information," includes, for example, your name, address, and certain other data such as your social security number, income and deductions data, and other information about you and your dependents that you provide to us or obtained by us from third parties with your authorization in order to prepare or file your tax return. Additionally, you may choose to provide copies of statements that include bank or other investment account numbers, balances, and transactions.
- Our electronic filing software contains features to assist in the preparation of your tax return and to reduce the chance for errors when entering tax data. In order to complete electronic filing of your return, we may collect information about you from third parties to populate portions of your electronic tax return such as information from a W-2 or 1099.
- The IRS requires that CMW Financial, Inc. retain filed tax returns for a period of at least three years.

How We Protect Your Information

CMW Financial, Inc. disclosure of your information is controlled by Section 7216 of the Internal Revenue Code, the Gramm Leach Bliley Act of 1999, certain other laws, and CMW Financial, Inc. policies.

Except as otherwise provide for herein, CMW Financial, Inc. does not and will not share, sell, or otherwise disclose any information regarding our tax clientele to any third party organization for any purpose unless legally required to do so in connection with a lawfully issued subpoena, court order, or similar legal process or investigation or as may otherwise be required under the Internal Revenue Service Code.

CMW Financial, Inc. tax return preparers are authorized to access tax client information only when needed to complete a specific tax return, extension or amendment. Our preparer is an IRS Enrolled Agent and as such are bound by code of ethics that requires confidential treatment of any tax client information.

CMW Financial, Inc. may on occasion permit certain disclosures which shall include providing information to our employees, and in limited situations, to unrelated third parties who need to know that information in order to assist us in providing services to you. In all such situations, we stress the confidential nature of the information being shared.

CMW Financial, Inc. maintains policies and procedures designed to restrict access to your personal information in several ways. These include programs and specifications for physical security and records retention and disposal; computer and communication security measures reflected in system design, password protection, and data management practices; and other measures to restrict access to the data we hold in physical and electronic forms.

Contact for Questions or Concerns

If you have questions or concerns regarding this privacy policy, please contact CMW Financial, Inc. directly as follows:



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