

FACTS

WHAT DOES FPG TAX & ACCOUNTING DO WITH YOUR PERSONAL INFORMATION?

Why?

We collect certain personal information about you – but only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your personal income tax returns and may also provide various tax and financial planning services to you at your request.

What?

The types of personal information we collect depend on the services you have requested from us. This information can include:

- Social Security number and date of birth
- Assets and transaction history
- Financial and accounting records
- Tax returns and tax records

How?

As a general rule, we do not disclose personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed

Reasons we can share your personal information	Does FPG Tax & Accounting?	Can you limit this sharing?
In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.	YES	NO
In conjunction with a prospective purchase, sale, or merger of all or part of our practice, provided that we take appropriate precautions (for example, through a written confidentiality agreement) so the prospective purchaser or merger partner does not disclose information obtained in the course of the review.	YES	YES
As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.	YES	YES
To comply with a validly issued and enforceable subpoena or summons.	YES	NO
To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed.	YES	YES

To limit our sharing

Please note:

If you are a new client, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our client, we continue to share your information as described in this notice.

However, you can contact us at any time to limit our sharing.

Questions?

Call: 816-941-2900

Who we are**Who is providing this notice?**

FPG Tax & Accounting

What we do**How does FPG Tax & Accounting protect my personal information?**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

How does FPG Tax & Accounting collect my personal information?

Examples of sources from which we collect information include

- interviews and phone calls with you
- letters, text messages, or e-mails from you
- tax return or financial planning organizers
- financial history questionnaires

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing

Definitions**Affiliates**

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- ***Financial Partners Group***

Non-affiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- ***NONE***

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- ***NONE***

Other important information

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to employees of our firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our firm, applicable law, our Code of Professional Conduct, and nondisclosure agreements where appropriate. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction. Thank you for allowing us to serve your accounting, tax, and financial planning needs. We value your business and are committed to protecting your privacy.