

**Bette Wagner, CPA
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Privacy Policy

January 1, 2025

Your privacy is important to me, and I am legally required to comply with specific data-sharing regulations. Please read the following privacy policy before proceeding.

I collect nonpublic personal information (NPI) about you and your household or business from various sources, including:

- **Interviews regarding your tax situation**
- **Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, # of dependents, income, & other tax-related data**
- **Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT, 1099-DIV, and stock transactions**
- **Electronic tools and applications used to collect, store, reconcile, and compile such information**
- **Any other documents you provide to assist in preparing your tax return.**

I do not disclose any nonpublic personal information about my clients, former clients, or prospective clients to anyone except as requested by my client in writing or as required by law.

I restrict access to personal information concerning you. I maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about this privacy policy, please contact me at the phone number above or by email at bette@bettewagner.com.

Thank you,

Bette Wagner, CPA