

## **Your Privacy is Important to Us.**

### **What is this Privacy Assurance for?**

Privacy Assurance provides an overview of our privacy principles and practices and seeks your consent to the collection, use or disclosure of your personal information in connection with the preparation of your tax return or to provide other products or services that you have requested through our services.

Protecting your privacy is important to us.

J&L Income Tax & Accounting was founded on principles of trust, integrity, and the delivery of outstanding products and services. J&L Income Tax & Accounting is committed to customer satisfaction and maintaining our customers' privacy. This is accomplished by a range of business procedures and security safeguards to ensure that your personal information is kept confidential, safe and secure and is only used in accordance with our Privacy Policy or as otherwise consented to by you.

### **What we collect.**

We collect the following personal information about you, from you, either directly through persons or entities acting on our behalf;

- personal information that you enter on an income tax form, including your name, address, social insurance number, and other identifying and contact information, in addition to your tax and financial information and your e-mail address;
- information from applications, forms, surveys, and in connection with polls or contents, including your name, address, and e-mail address; and
- information for billing and payment purposes, including credit or debit card information, such as card number and card expiration date.

### **We collect only what is necessary.**

We limit the collection of personal information to that which is necessary to fulfill the purposes identified at the time of collection. We collect personal information about you so that we can effectively provide the services and products to you that you have requested (including completing and filing your income tax, establish your identity, manage our operations, understand your needs and preferences, market our products and services and comply with legal and regulatory requirements. We will not share your personal information.

### **We Respect your choice.**

We May obtain your express consent in writing (ie. When we collect, use or disclose sensitive personal information), through electronic means, or verbally. Your consent may also be implied by an action that you have taken, but this will only be in circumstances that do not involve sensitive personal information. We also use personal information to enable us to understand your needs and preferences and then to alert you by mail, or phone or e-mail to current and future product offerings, and to tailor marketing material to your specific needs. You can always refuse or withdraw your consent to the collection, use or disclosure of your personal information. Doing so may, in some cases, mean that we will be unable to provide you with the product or service that you have requested. If you wish to withdraw you consent to the collection, use or disclosure of your personal information (subject to legal or contractual restrictions and reasonable notice e.g., providing you with necessary information relating to your accounts with us, or as required or permitted by law).

### **We limit disclosure.**

We do not disclose your personal information to third parties except as described in this Privacy Assurance, with your consent, or as permitted or required by law. Your personal information may be disclosed to the following third-parties.

We require them to retain any personal information in strictest confidence and we restrict their use of your personal information to what is necessary to act on our behalf or to provide services at your request;

to offer you products and services which may be of interest to you (though you may, of course, choose not to receive these materials, as noted above);

- in the event we enter into or contemplate entering into a business transaction.

Please note that personal information disclosed to J&L Income Tax & Accounting will be securely used or stored in Canada and be subject to the laws of Canada. Accordingly, personal information provided to J&L Income Tax & Accounting for storage or processing, will be subject to Canadian laws.

**We protect your information.**

We protect personal information by security safeguards appropriate to the sensitivity of the information. We restrict internal physical and electronic access to personal information to those employees who need to access it in order to serve you. We also maintain policies and procedures designed to restrict access (*by external parties*) to your personal information in several ways.

For both internal and external parties, access controls included programs and specifications for physical security, records retention and disposal, computer and communication security measures reflected in system design, password protection, data management practices, and other measures

to restrict access to the information we hold in physical and electronic forms.

We only retain your information for as long as necessary or required.

We only retain personal information for as long as necessary, as needed for the purposes for which it was collected, or as required by law. Personal information that is no longer necessary or required will be destroyed, erased, or made anonymous. It is important that the personal information we have is accurate, complete, and up to date. To this end, you are encouraged to inform us when there are any changes to your information.

By signing this form below, you acknowledge that you have received and reviewed J&L Income Tax & Accounting Privacy Assurance and Privacy Policy and consent, use or disclosure of your personal information for the purposes and in the manner described herein.

Dated \_\_\_\_\_, 20 \_\_\_\_\_

Name \_\_\_\_\_ Signature \_\_\_\_\_  
(Please print first & last name)