

Ridler Investment & Tax Advisory, Ltd.

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Privacy Policy

Your privacy is important to us

Although federal and state laws require distribution of this notice, our stringent confidentiality practices have not changed. You do not need to respond to this notice, unless you disagree with our policy.

What personal information do we collect?

To meet your needs in tax and financial planning and/or other services, we collect the following: 1) personal information from you in person, over the phone, by mail or e-mail, by fax, through our website, on tax preparation worksheets, and/or other documents or forms; 2) personal information received from other institutions with which you have a business relationship; and 3) personal information about your transactions with us. For example, we may contact parties such as your bank or stockbroker to obtain information needed to complete your tax return or to provide another service.

Is personal information shared with others?

We handle your information with the utmost confidentiality and care. We restrict access to your nonpublic personal information to individuals and entities that need to know this information to complete work for you. We do not disclose your personal and confidential information to anyone outside our firm without your written consent except as provided in this policy.

You have hired us to provide all available information and resources at our disposal to assist in building and maintaining your financial security. We may use your information internally to make you aware of other services and products offered through our offices or by third parties.

Additionally, the law permits disclosure in certain instances to protect against fraud, to respond to court subpoenas, and so forth.

Finally, we disclose your personal information to non-affiliated third parties in certain circumstances. Periodically we share some information with third parties in the process of helping you with your finances or insurance. We work closely with the third parties in assuring your information is handled with the utmost care. Specifically, we disclose such information to other professionals whom you have engaged to represent you in financial and legal matters. For example, we may disclose information of your tax liability to your attorney or stockbroker. This practice allows us to provide you with timely service, even though you may not be immediately available to give specific authorization prior to each disclosure or it may be impractical to contact you.

How do you further limit our sharing of personal information?

If you prefer that we not share your personal information under any circumstances with third parties, such as your attorney or stockbroker, please respond in writing and mention the phrase "Privacy Policy."

How do we protect the confidentiality and security of your personal information?

We maintain physical, electronic, and procedural safeguards to protect disclosure of your nonpublic personal information.