

Roth Co CPA is committed to ensure the privacy of information our clients share with us.

We have adopted this Privacy Policy related to the collection, use and disclosure of personal information by the firm, its partners and employees (Roth Co).

Information we collect

We collect information about individuals, businesses and other organizations, including names, addresses, social security and other identifying numbers and many other personal details. In addition, we obtain financial data such as income, expenses, assets and liabilities as well as statements and reports from third parties such as bank statements and actuarial reports. We never collect any of this information without your consent, unless it is provided to us by another client together with other data we need.

What we do with your information

We use your information to prepare tax returns, information returns, financial statements and provide other services you have engaged us to provide.

When and how we share your information

We share your information with government agencies when we are engaged to prepare and file tax returns, prepare and file other reports, or upload financial statements.

We share your information, with your consent, as necessary to complete our audit, or other work. For example, we may share your bank account number with a service to obtain confirmation of your bank balance. When we do so, we ensure the third party has a privacy policy.

We also share your information, with your consent, when we represent you before the Internal Revenue Service or other government bodies.

And we may share your information, with your consent, in discussions with bankers, mortgage brokers and others when you have engaged us to do so.

How we do not share your information

We do not share your information for marketing or any purpose other than that for which it was collected, except with the consent of the individual or as required or permitted by applicable law.

Our security system

We take reasonable and appropriate steps to protect information that you share with us from unauthorized access or disclosure. We maintain files on secure password-protected servers in a restricted-access data center. We change passwords frequently and your data is backed up frequently. We control access to our office and shred all discarded documents.