

Privacy Policy

It has always been the policy of Tido Financial to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizer, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
- Information about your transactions with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

- Requirements to comply with federal, state, or local law.
- Requirements to comply with national, state, or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable.
- Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

I have read the above engagement letter and understand my responsibilities with regard to income tax preparation. If there are other tax returns that I expect you to prepare, such as tax returns for my children, or other services, such as financial planning or insurance review, I will note them at the end of this letter.

Accepted by:

Taxpayer Signature

Date

Name (print) _____

Spouse Signature

Date

Name (print) _____

Other Services to be Performed (returns for children, financial planning, insurance review, investment services, etc.):
