



## **PROTECTING YOUR PRIVACY AND DATA**

Protecting your privacy is important to us. We understand the value of the personal information that you share with us during the preparation of your tax returns, and we take our obligations very seriously.

- Your personal information is shared only with those employees with whom it is necessary to perform the services you have hired us to do. State and federal laws, and the standards of the CPA profession, pledge us to keep your information **confidential** unless we are required by a legal authority to divulge the information.
- Your personal information is stored in a secure space or on a secure computer. If you ever discontinue your client relationship with us, we will provide access to your returns for a period of **90 days**, and we will continue to protect the information until it is no longer needed.
- Our general policy for retaining records is **7 years**. When your information is no longer needed, it is shredded, erased, or destroyed before being recycled.

Data security remains a top priority at Boulder CPA Group, and we are committed to staying on the front line in defense of our clients' valuable information.

- We regularly evaluate the administrative, technical and physical safeguards we have in place to protect client data, complying with all regulations and recommendations.
- We partner with a reputable IT firm to maintain and monitor our network 24/7, which includes state-of-the-art firewall and anti-virus protection, intrusion detection, limited access, spam and content filtering, full onsite and offsite backups, new hardware installations, and software upgrades with security patches.
- We have strong password requirements for all our staff members, and they are continuously educated on our data security policies and procedures as well as any emerging threats to the integrity of our data.
- We password-protect all emailed sensitive information, and we strongly encourage the use of our online **portal** for the transmission of client documents. Documents on the portal are encrypted, securely stored and monitored.

Visit our website at [www.bouldercpagroup.com](http://www.bouldercpagroup.com) for more information about Data Security and ID Theft (under Guides) as well as past newsletters on this topic (under News: Firm Email Updates)