

Privacy Policy

****Phone numbers collected for SMS consent will not be shared with third parties or affiliates for marketing purposes under any circumstances****

This Privacy Policy outlines how our firm, Marilyn Heller Ayers PC, handles the tax return information of our clients in compliance with Internal Revenue Code [Section 7216](#) and related regulations. We are committed to protecting your privacy and ensuring the confidentiality of your tax return information.

1. Collection of Information - We collect tax return information from you to prepare and file your tax returns. This information includes, but is not limited to, your name, address, Social Security Number, income details, and other financial information necessary for tax preparation.

2. Use of Information - We use your tax return information solely for the purpose of preparing and filing your tax returns. We may also use this information to provide auxiliary services related to tax return preparation, such as tax planning and advice.

3. Disclosure of Information - We will not disclose your tax return information to third parties without your explicit consent, except as permitted by law.

4. Consent to Disclose or Use Information - If we need to disclose or use your tax return information for purposes other than preparing and filing your tax return, we will obtain your written consent as required by IRS.

- If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.
- If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

5. Data Security - We implement administrative, technical, and physical safeguards to protect your tax return information from misuse, unauthorized access, or disclosure. These safeguards include, but are not limited to, secure data storage, encryption, and access controls.

6. Retention of Information - We retain your tax return information for as long as necessary to fulfill the purposes for which it was collected, comply with legal and regulatory requirements, and resolve disputes. Typically, this period is three years from the due date or extended due date of the tax return.

7. Your Rights - You have the right to access and review your tax return information that we hold. You may also request corrections to any inaccuracies in your information. To exercise these rights, please contact us at 732.477.2281.

8. Changes to This Policy - We may update this Privacy Policy from time to time to reflect changes in our practices or legal requirements. We will notify you of any significant changes by posting the updated policy on our website and, if necessary, obtaining your consent.

Contact Us

If you have any questions or concerns about this Privacy Policy or our handling of your tax return information, please contact us at 732.477.2281.