

MUELLER & ASSOCIATES, CPAS

PRIVACY POLICY

Facts

What does Mueller & Associates, CPAs do with your personal information?

Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depends on the product or service you have with us. This information can include, but is not limited to:
Social Security number and income.
Assets and transaction history.
Investment experience and risk tolerance.

How?

Mueller & Associates does not share clients' personal information with other accounting firms. In the section below, we list the reasons accounting firms can share their clients' personal information and confirm that Mueller & Associates does not engage in such sharing.

Reasons we can share your personal information	Does Mueller & Associates, CPAs?	Can you limit this sharing?
For our everyday business purposes – such as processing your transactions, maintaining your account(s), responding to court orders and legal investigations, or complying with regulatory requirements	NO	We do not share
For our marketing purposes – to offer our products and services to you	NO	We do not share
For joint marketing with other accounting firms	NO	We do not share
For our affiliates' everyday business purposes – information about your transactions and experiences	NO	We do not share
For our affiliates' everyday business purposes – information about your transactions and experiences	NO	We do not share
For our affiliates to market to you	NO	We do not share
For non-affiliates to market to you	NO	We do not share

Who is providing this notice?

Mueller & Associates, CPAs

Questions?

Call: (512) 518-5000

What we do

How does Mueller & Associates protect my personal information?

To protect your personal information from unauthorized access and use, we restrict access to your nonpublic personal information to those employees who need to know that information to service your account. We also maintain physical, electronic, and procedural safeguards that comply with applicable federal or state standards to protect your nonpublic personal information.

How does Mueller & Associates collect my personal information?

We collect your personal information, for example, when you:

- Become a prospect or give us contact information
- Provide financial information or tax documents
- Engage us for tax preparation, tax planning, litigation, bookkeeping, or other accounting services

Other Important Information

By signing the Mueller & Associates agreement, I acknowledge that I have fully read and understand this Privacy Policy and opt-in as outlined above. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with my financial professional.