



3040 Kingsbarns  
The Colony, TX 75056  
Telephone: (214) 494-2715  
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## **Privacy Policy**

The personal, non-public information we collect about you has been derived from the following sources:

1. Applications, tax preparation worksheets and any other document that you may have provided for use in preparing your tax return or your financial plan.
2. Transactions with us or others.
3. Information we received from a consumer reporting agency.

No personal information will ever be disclosed about you to anyone, except that which is already public or permitted by law.

Should you close your account with us, or become an inactive client, we will continue to adhere to the policy regulations as written here.

The information you give us about your personal or business records is reserved only for our employees who need to know in order to service your account.

Procedural physical and electronic safeguards will be maintained in compliance with Federal standards regarding non-public personal information.

We are committed to retaining your confidence and want to assure you that any information you give us remains safe and confidential.

Please feel free to contact us if you have any questions concerning this policy.