

## **Privacy Policy Notice under Gramm-Leach-Bliley Act (Pub L 106-102)**

This notice describes Passaro, Kahne, Taylor, DeFrancesco & Thompson Law Offices, P.L.L.C.'s privacy policies and practices. You have probably received many similar notices from credit card companies, banks and other financial institutions.

We collect information in order to help our clients in a variety of ways. Mostly we collect information from clients. We also get information from others who provide services to you, typically accountants, financial advisors, life insurance salesmen, etc.

Attorneys, like other professionals who advise clients on personal financial or tax matters, are now required by a new federal law to inform certain people of their policies regarding privacy of information. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by this new law. Therefore, we have always protected your right to privacy.

In the course of providing our clients with income tax, estate tax, and gift tax advice, we receive significant personal financial information from our clients. If you are a client of our firm, you should know that all information that we receive from you is held in confidence, and is not released to people outside the firm, except as agreed to by you, or as required under an applicable law.

If we are working on a transaction for you, we may in the course of that representation release information to someone else. For example, if you were selling real estate, we would need to provide the person handling the closing with your social security number so that person could prepare a 1099. In addition if we are working on some planning with one of your other advisors (accountant, financial planner, insurance agent, broker, or the like) we may need to disclose information about you. In reality, we usually do not provide information to these other advisors. Instead they usually provide information to us.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and in, some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Receipt of this notice does not necessarily mean that you have an Attorney/Client relationship with our office.