

PRIVACY POLICY

Kristal Landrum Bookkeeping

Effective Date: August 1, 2026

At Kristal Landrum Bookkeeping, we respect your privacy and are committed to protecting the confidential financial, personal, and business information you entrust to us. This Privacy Policy explains how we collect, use, disclose, and safeguard your information when you use our bookkeeping, tax preparation, and mobile notary services, or visit our website.

1. Information We Collect

In order to provide comprehensive back-office accounting, tax, and notary services, we collect information that identifies, relates to, or describes you or your business. This includes:

- **Personal and Business Identifiers:** Name, business name, physical address, email address, phone number, and professional contact details.
- **Government Identifiers:** Social Security Numbers (SSNs), Employer Identification Numbers (EINs), driver's license numbers, and other government identifiers necessary for tax filing and legal notarizations.
- **Financial Information:** Bank statements, credit card statements, general ledgers, profit and loss statements, payroll documents, tax history, and invoice records.
- **Digital Credentials:** Account login details when securely shared to sync financial institutions or accounting software.

2. How We Use Your Information

We use the information we collect solely to run our business operations and provide tailored services to you, specifically to:

- Maintain accurate ledgers, reconcile accounts, and manage your back-office financial tasks.
- Accurately prepare, review, and file your local, state, and federal tax returns.
- Verify identities and execute official document notarizations.
- Communicate with you on your preferred schedule to answer questions or anticipate business needs.
- Comply with federal and state regulations, professional accounting standards, and legal requirements.

3. Information Sharing and Disclosure

We do not sell, rent, or trade your personal or financial information to third parties. We only share information under the following limited circumstances:

- **Service Providers:** With internal contractors or software platforms (such as secure accounting or tax preparation software) that directly assist in delivering your services. All third-party providers are legally bound to strict confidentiality agreements.
- **Authorized Third Parties:** With your explicit written consent, we will share data with specified individuals, such as your certified public accountant (CPA), business partners, or lenders.
- **Legal Obligations:** We may disclose information if required to do so by law, subpoena, or to comply with IRS or state tax authority regulations.

4. Data Security and Retention

We implement robust, industry-standard administrative, technical, and physical security measures to safeguard your sensitive back-office data. This includes utilizing secure file transfer portals, encrypted communication lines, and restricted access to digital and physical files.

We retain your financial records and personal data only as long as necessary to fulfill the services contracted, comply with tax retention laws (typically 7 years for tax records), or resolve legal disputes.

5. Your Rights and Choices

You maintain complete ownership and control over your financial records. You may request to review, update, or correct the personal and business information we have on file at any time. You can also request the secure return or destruction of your files, subject to our statutory record retention obligations under state and federal law.

6. Updates to This Policy

We may modify this Privacy Policy from time to time to reflect shifts in our practices or changing legal requirements. We will notify you of any material changes by updating the effective date at the top of this document.

7. Contact Us

If you have questions, concerns, or requests regarding this Privacy Policy or how your data is handled, please contact us directly at www.landrumbooks.com.