

Alesa D. Downing, CPA PLLC
1504 N. Greenville Ave, Suite 150, Allen, Texas 75002
972-727-9502
Our Privacy Policy and Audit Policy

Your Information

Your nonpublic information is collected from various sources:

- Information received from you on tax organizers, worksheets, client questionnaires, applications and other financial documentation you provide
- Information you provide during personal interviews and telephone conversations
- Information about your transactions with the firm
- Information received about you from consumer reporting agencies if background or credit checks are conducted on your behalf

Non-Disclosure

Your nonpublic personal information is not disclosed to any person or party, except as required by law or to facilitate filing your tax return. Upon closing your account, your nonpublic personal information will not be disclosed to any person or party.

Security

Access to your information is restricted in a variety of ways:

- All employees are required to sign a Non-Disclosure agreement.
- Physical security, electronic security safeguards, and strict procedural measures consistent with federal standards are in place to protect your nonpublic personal information.
- All documents, work papers, schedules, or forms containing names, addresses, social security numbers or financial information are shredded using a cross-cut shredder if they are not required to be archived by law or common sense.

Audit Policy

Any notification that you receive from the IRS or any taxing authority must be submitted to Alesa D. Downing, CPA PLLC for immediate review. We will address the issue on your behalf with the taxing authority for any return we have prepared. It is your responsibility to provide all the information required for the preparation of complete and returns. You should retain all the documents, cancelled checks, and other documents that form the basis of income and deductions. To hold down the cost of preparing your return, we may not make copies or all original tax data you submit to us or keep copies of such data in our files. You should always retain the originals or copies of the originals for your files. They may be necessary to prove the accuracy and completeness of the returns to the taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign and file them.

If a tax return is selected by the IRS or another taxing authority for review or audit, we **MUST** have an in-person pre-audit meeting prior to the audit.

Please know that your privacy is important to us, and trust that protecting that privacy is equally important.

We are very pleased to have this opportunity to serve you.

Alesa D. Downing, CPA