

# THOMAS E HEALY

CERTIFIED PUBLIC ACCOUNTANT, PC

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## ABOUT YOUR PRIVACY

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*Business Advisor*

*Tax Planning*

*Tax Preparation*

*Retirement Planning*

*Accounting*

*Financial  
Statements*

*Personal Financial  
Planning*

### *Memberships*

American Institute of  
Certified Public  
Accountants

Colorado Society of  
Certified Public  
Accountants

Society of Certified  
Senior Advisors



I have always protected your right to privacy in line with professional standards. I quote here the requirements of the Internal Revenue Service and the Colorado State Board of Accountancy:

Section 6103(a)(3) of the Internal Revenue Code provides, "no ... person ... who has or had access to returns or return information ... shall disclose any return or return information obtained by him in any manner in connection with his service as such an officer or an employee or otherwise or under the provisions of this section."

In addition, the rules of the Colorado State Board of Accountancy require that I "shall not disclose or use for [my] own benefit any confidential information pertaining to a client, which information is obtained in the course of ....performing professional services." There are certain permitted exceptions.

In order to assist you with your professional needs and, in some cases, to comply with professional guidelines, I retain records relating to the professional services I provide you. I have rigorous physical, electronic, and procedural safeguards in place to protect these records, and they are accessed internally only on an 'as-needed' basis. Internet communication with you is made using encryption or with a guaranteed signature when you request it.

I do not disclose your information except as required or permitted by law. Permitted disclosures include third parties who assist me in providing services to you, such as ATX and Thomson Creative Solutions, the vendors providing me with my tax compliance software.