

Privacy Policy

Effective Date: January 2, 2025

1. Introduction

Welcome to Vertex Accounting Partners LLC (“we,” “our,” “us”). We are committed to protecting your privacy and ensuring that your personal information is handled in a safe and responsible manner. This Privacy Policy outlines how we collect, use, disclose, and protect your information.

2. Information We Collect

We may collect the following types of information:

- **Personal Information:** Name, address, email address, phone number, Social Security number, tax identification number, number of dependents, and other personal details.
- **Financial Information:** Income, tax returns, bank account details, and other financial data.
- **Tax-Related Documents:** Applications, organizers, or other tax-related data such as Forms W-2, 1099R, 1099INT and 1099-DIV, and stock transactions.

3. How We Use Your Information

We use your information to:

- Provide and manage our tax accounting services.
- Communicate with you about your account and our services.
- Process payments and refunds.
- Comply with legal and regulatory requirements.
- Improve our services and customer experience.

4. Information Sharing and Disclosure

We do not sell or rent your personal information to third parties. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law. We may share your information with:

- **Service Providers:** Third-party vendors who assist us in providing our services.
- **Legal Authorities:** When required by law or to protect our rights and property.
- **Business Transfers:** In the event of a merger, acquisition, or sale of assets.
- **Client Requests:** We will disclose information to a third party with your written request.



5. Data Security

We implement appropriate technical and organizational measures to protect your personal information from unauthorized access, use, or disclosure. We restrict access to personal information concerning you, except to our employees who need such information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with Federal regulations to guard your personal information. However, no method of transmission over the internet or electronic storage is completely secure.

6. Your Rights

You have the right to:

- Access and review your personal information.
- Request corrections to your personal information.
- Request the deletion of your personal information, subject to legal and contractual obligations.

7. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. We will notify you of any changes by posting the new Privacy Policy on our website and updating the effective date.

8. Contact Us

If you have any questions or concerns about this Privacy Policy, please contact us at: Vertex Accounting Partners LLC, 3000 Woodcreek Drive, Suite 120, Downers Grove, IL 60515, (630)657-1810.