

Client Privacy Policy

1. Our Commitment to Your Privacy:

We, LaMountain, Riccardelli & Petkovich Accounting, are committed to protecting the confidentiality and privacy of your nonpublic personal information, adhering to strict professional standards and legal requirements, including [AICPA](#) ethics and IRC Section 7216 for tax data.

2. Information We Collect:

We collect personal data you provide (name, contact info, financial details, tax documents) or that we obtain with your authorization to perform accounting, tax, and advisory services.

3. How We Use & Share Information:

- **For Service Delivery:** To prepare tax returns, provide financial advice, and fulfill our contractual duties.
- **Limited Disclosures:**
 - With your consent.
 - To authorize third-party service providers (e.g., software vendors) who agree to confidentiality.
 - To government agencies (IRS, state) if legally required or to represent you.
 - In legal proceedings or to defend our practice (with precautions).
 - During a potential sale or merger of our practice, under strict confidentiality.
- **We Do Not Sell Data:** We do not sell, rent, or lease your information.

4. Data Security & Safeguards:

We maintain physical (locked files), electronic (encryption, secure portals like [SmartVault](#) & [UltraTax](#)), and procedural safeguards to protect your data. Access is limited.

5. Data Retention:

We retain client records as required by professional standards (often 3 years) to better serve you and comply with regulations.

6. SMS Terms & Conditions

By opting into SMS from a web form or other medium, you are agreeing to receive SMS messages from LaMountain, Riccardelli & Petkovich Accounting. This includes SMS messages for conversations (external). Message frequency varies. Message and data rates may apply. See privacy policy at www.lamricaccounting.com. Message HELP for help. Reply STOP to any message to opt out.

7. Your Consent & Rights:

Your consent is required for uses beyond service provision. You can opt out of certain communications.

8. Questions?

Contact LaMountain, Riccardelli & Petkovich Accounting at 518-643-5129 or 860-824-9955 with any privacy concerns.

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