

James Erickson & Co., P.S.
Century Capital, LLC
Privacy Policy Notice

The privacy and security of your personal and business information is a top concern for us. We respect the trust you place in us, and we handle your personal information with care. Please read the following Privacy Notice for important information about how we treat your personal information.

How your information is protected

CPAs and Financial Advisors have been and continue to be bound by professional standards of client confidentiality that are even more stringent than those required by Federal & State law. We adhere to those professional standards as well as the legal requirements to protect your right to privacy. We restrict access to nonpublic personal and business information about you to our employees who need to know that information to provide our services to you. We maintain strict physical, electronic, and procedural safeguards to guard your nonpublic personal information.

The Information We Collect About You

We collect certain personal information about you when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your personal income tax returns, provide financial planning services, or manage your investments. Examples of sources from which we collect information include:

- ?? interviews and phone calls with you,
- ?? letters or emails from you,
- ?? tax return or financial planning organizers, financial history questionnaires, and
- ?? correspondence, financial statements, or other documents provided by you.

How We Handle Your Personal Information

We do not sell or trade information about current or former clients or their accounts to third parties. Nor do we share such information, except when necessary to complete transactions or services at your request. Examples of how we use your confidential information include:

- ?? To respond to or consult with the IRS, State or Local tax authorities to represent your interests or complete certain transactions or account changes that you direct. For example, if you ask us to transfer assets from one financial institution to another, we will need to provide certain information about you to those companies to complete the transaction.
- ?? To facilitate services you request, we may share information among our affiliated companies. This would include, for example, James Erickson & Co., P.S. providing tax data necessary for Century Capital, LLC to efficiently manage your portfolio.
- ?? Finally, we will release information about you if you direct us to do so, if we are compelled by law to do so, or in other legally limited circumstances (for example, to protect your account from fraud). This applies even if you are no longer a client.

We'll Keep You Informed

As required by federal law, we will notify clients of our privacy policy annually. We reserve the right to modify this policy at any time, but rest assured that if we do change it, we will tell you promptly. You will also be able to access our privacy policy from our website. (www.wolfenet.com/~cpas4tax)