

***DLM Tax Services***  
*Mailing Address: 5318 E. 2<sup>nd</sup> Street, # 508*  
*Long Beach, California 90803*  
*(562) 620-6339 (phone)(text)*  
[www.DLM-Services.com](http://www.DLM-Services.com)  
*e-mail: debbie@DLM-Services.com*

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## **DLM Tax Services Privacy and Engagement Statement**

### **Privacy**

The Gramm-Leach-Bliley Act and related Federal Trade Commission (FTC) regulations, requires that Enrolled Agents and all other personal financial service providers disclose their privacy policies to clients in a written notice. These policies pertain to non-public personal information about current and former clients.

Of course, DLM Tax Services has always protected your right to privacy with professional standards that are even more stringent than those required by law.

In order to assist you with your professional needs and, in some cases, to comply with professional guidelines, we retain records relating to the professional services we provide you. We have rigorous physical, electronic, and procedural safeguards in place to protect these records, and they are accessed internally only on an 'as-needed' basis.

Non-public personal information is never collected without your authorization, and we do not disclose such information except as required or permitted by law. Permitted disclosures include third parties who assist us in providing services to you, such as Lacerte Software Corporation, an Intuit Company, the vendor providing us with our tax compliance and accounting software.

### **Your Responsibilities**

It is your responsibility to provide us with all of the information necessary to complete your tax return. In that regard you agree to provide true, correct and complete information regarding your income and amounts claimed as tax deductions. You have maintained and will retain for 4 years all the documents to substantiate the items of income and expense claimed on your return. We will not audit or otherwise verify the information that you supply, however we may require clarification or additional information. We also suggest that you contact us immediately if you discover additional information that will lead to a change in your return, or if you receive any correspondence from the IRS, state or local taxing agencies. You are responsible for all taxes, penalties and interest resulting from disallowed deductions or the inclusion of additional income by the taxing authorities. However, in the event of preparer error, you are responsible for additional tax due but we will stand behind our work and credit you for any penalty imposed. If you have any questions regarding these issues, please do not hesitate to call DLM Tax Services, at (562) 620-6339 or e-mail us at [debbie@DLM-Services.com](mailto:debbie@DLM-Services.com).

Sincerely,

DLM Tax Services