

What does Purtil & Company do with your personal or business information?

Financial companies choose how they manage your personal information. Federal law gives consumers the right to limit this management. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.

General

All financial companies need to collect and share client personal information to run their everyday business as permitted by law. For example, we share email addresses with our internet service provider in order to transmit our newsletters and other communications. In this document, we discuss our policies and procedures for handling our clients' personal and business information.

Unlike many companies like ours, we do not practice either outsourcing or cross-marketing. That is, your information, documents and files remain under our control at all times. Moreover, we take steps to insure future availability of your information. We observe the same precautions regardless of the type of service we provide: consulting, tax, accounting, AccountMate.

What information?

The types of personal information we collect depend on the services we perform for you. This information can include:

- # Social Security number and income.
- # Information about where you live, relatives, assets, liabilities and debts.
- # Account balances and account transactions with us.
- # Business income, such as sales, selling prices, customer list, supplier list.
- # Transactions from your accounting system files.

Retention periods

We keep information active clients for a minimum of 10 years, which corresponds to the IRS *open* years for collection and adjustment. For former clients, we keep information for the minimum of 3 years. If you send us a copy of your accounting system files, we erase it after we no longer have a need for it, usually about three months.

After the retention period for paper documents, we hire a mobile shredding company to shred and recycle inactive records. Draft documents are shredded on a current schedule based on volume.

Storage methods

We use all of the following:

- # Paper files stored on-site or in a secure, locked and guarded off-site storage facility.
- # Electronic files stored on our servers.

Security

Our office building is locked after normal business hours and open only to persons having an access key. Our office has an alarm system and the space outside the reception area is open only to authorized persons, such as employees, clients and equipment service personnel. Our servers are secure from outside access, and employ up-to-date virus and security access software.