

Paller Financial Services, Inc.
Privacy Statement
*****FOR DISCLOSURE PURPOSES ONLY*****

The law requires that CPAs 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.

Of course, Paller Financial Services, Inc. has always protected your right to privacy within our professional standards.

To assist with your professional needs and, in some cases, to comply with professional guidelines, we retain records relating to the services we provide. 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 (such as tax software and data storage providers) who assist us in providing services to you at your request. As an example, the tax preparation or investment management software we use.

At Paller Financial Services, Inc., we are committed to keeping your information private and recognize the importance clients place on the privacy and confidentiality of their information. While new technologies allow us to more efficiently serve you, we are committed to maintaining the rigorous privacy standards that are synonymous with our established and trusted name.

Information provided by you to our firm is used strictly for lawful business purposes and is never shared with third parties except as required by law.

Your privacy is just as important to us as our ability to provide you with quality services. Please call if you have any questions about this statement.

Sincerely,

Paller Financial Services, Inc.