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In order to meet the requirements of the Gramm-Leach-Bliley Act of 1999, I am writing you this letter to make certain you are aware of the privacy policy of my firm. In addition, Internal Revenue Code Section 6713 prohibits any disclosure of tax return information, including basic directory information (i.e. name, address, phone number) with non-affiliated third parties.

## Privacy Policy

We do not disclose any non-public personal information about our customers or former customers, or as required by law. Further exception is made with respect to basic information, limited to name, address, phone number, related parties, and dates. We may refer this information to an affiliated financial service professional where such referral is thought to be in your interest. Please advise us if instead you would require us to hold all information, including basic directory information, confidential.

It is the policy of Gudgel Professional Services to handle the information you provide us with the utmost confidentiality and care. We restrict access to nonpublic personal information about you to members of our firm who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal and confidential information to anyone outside our firm without your express written permission to do so.

We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

Sincerely,

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Katherine Gudgel, E.A., Ph.D.  
Gudgel Professional Services

I have reviewed this policy.

\_\_\_\_\_  
Client Date \_\_\_\_\_

\_\_\_\_\_  
Spouse Date \_\_\_\_\_