

JK Associates, LLC, Tax and Consulting Services
9520 Berger Road, Suite 310, Columbia, MD 21046

Privacy Policy

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies. Here is our policy:

We handle all information you provide us with the utmost confidentiality. Your personal information will only be shared with members of our firm who need to know this information in order to complete the work you have hired us to do. We will not disclose your personal information to anyone outside our firm without your express written permission to do so, or unless we are legally required to do so. Our preference is to provide you with any information requested by a third party and allow you to deliver it.

We restrict access to your personal information to those professionals necessary to the functioning of our firm. For example, our IT support company has access to our network to provide support and thus potentially has access to tax information. Our tax preparation software providers have access to your tax information in order to e-file your tax returns or troubleshoot software issues. On occasion we use the service Gruntworks to OCR and process tax documents. ATOM tax management software is a cloud-based client database and secure portal provider.

We maintain physical, electronic and procedural safeguards to guard your non-public personal information. Our staff annually attends continuing education on tax office security and follows recommended procedures.

You should also be aware that anything you tell us during the interview for the preparation of your tax return is confidential, but not protected from the IRS. Privileged communications (those that are protected from IRS authority to compel our testimony) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although we consider any information you provide us as confidential, return preparation engagements are not covered by advisor-client privilege. If you feel the nature of any subject matter to be discussed requires protected communications, please raise that issue so that we can discuss your possible need to consult with an attorney for legal advice.