



**LEE R.C. THERIAULT, CPA**  
*Certified Public Accountant*

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34 East Main St. - Suite 102 Fort Kent, Maine 04743  
Phone: (207) 834-5448 Fax: (207)834-7299  
theriaultcpa@fairpoint.net www.stjohnvalleycpa.com

## **OUR PRIVACY NOTICE**

### **Your Information**

Your nonpublic personal information is collected from various sources:

- Information received from you on tax organizers, worksheets, client questionnaires, applications and other financial documentation you provide;
- Information you provide during personal interviews, telephone conversations, and emails;
- Information about your transactions with the firm;
- Information received about you from consumer reporting agencies if background or credit checks are conducted on your behalf.

### **Non-Disclosure**

Your nonpublic personal information is not disclosed to any person or party, except as required by law or to facilitate in filing your tax return.

Upon closing your account, your nonpublic personal information will not be disclosed to any person or party.

### **Security**

Access to your information is restricted in a variety of ways:

- Only to those employees who have a need to know to provide products or services to you;
- Physical security, electronic security safeguards, and strict procedural measures consistent with federal standards are in place to protect your nonpublic personal information.

Your privacy is important. Please trust that protecting your information is equally important. Please call if you have any questions.