

Privacy Policy and Consent Form

Howland Tax Services

The use of personal information in Canadian commercial activities is protected by federal legislation under the *Personal Information Protection and Electronic Documents Act* (PIPEDA).

The PIPEDA establishes a set of ten principles that organizations must follow when collecting, using and disclosing personal information in the course of commercial activity. Howland Tax Services is completely committed to these ten principles.

Ten Privacy Principles

1. Accountability: *An organization is responsible for personal information under its control and shall designate an individual or individuals who are accountable for the organization's compliance with the following principles.*

Howland Tax Services maintains and protects its own database of personal information. All staff members at Howland Tax Services are trained in the appropriate use and protection of that information, and are required to sign a confidentiality agreement. Brad Howland is the designated Privacy Information Officer for Howland Tax Services.

2. Identifying Purposes: *The purposes for which personal information is collected shall be identified by the organization at or before the time the information is collected.*

Howland Tax Services will use your personal information only for the purposes outlined below:

- Completion of your personal and corporate income tax returns, and filing them on your behalf if requested and authorized by you to do so;
- Communicating with Canada Revenue Agency (CRA), the Internal Revenue Service (IRS), or other state or local tax departments on your behalf, but only if you have given us additional authorization to do so by signing the appropriate consent form (in Canada: Form 1013 for individuals, Form RC59 for business);
- Updating our database records as your personal information changes;
- Communicating with you regarding your ongoing tax situation;
- Taking care of ongoing concerns on your behalf with your knowledge and permission; and
- Invoicing you for our tax services.

3. Consent: *The knowledge and consent of the individual are required for the collection, use or disclosure of personal information, except where inappropriate.*

Howland Tax Services requires you to sign this Privacy Policy and Consent Form, authorizing us to be in possession of the personal information you provide to us, and to use it as indicated in Principle #2 (above).

4. Limiting Collection: *The collection of personal information shall be limited to that which is necessary for the purposes identified by the organization. Information shall be collected by fair and lawful means.*

Howland Tax Services will only collect the personal information required for the preparation and completion of your income tax returns and the related purposes indicated in Principle #2 (above). Such information can include, but is not limited to, your name, address, telephone number, gender, social insurance number (SIN), social security number (SSN), and income.

5. Limiting Use, Disclosure, and Retention: *Personal information shall not be used or disclosed for purposes other than those for which it was collected, except with the consent of the individual or as required by law. Personal information shall be retained only as long as necessary for the fulfillment of those purposes.*

Howland Tax Services will not use your personal information for any other purpose than those indicated in Principle #2 (above).

6. Accuracy: *Personal information shall be as accurate, complete, and up-to-date as is necessary for the purposes for which it is to be used.*

Howland Tax Services will update your personal information in our database as such information is provided to us.

7. Safeguards: *Personal information shall be protected by security safeguards appropriate to the sensitivity of the information.*

At Howland Tax Services your personal information is protected from loss or theft and safeguarded from unauthorized access, disclosure, copying, use or modification. Your personal information is protected in all formats in which it is held. Our security safeguards include the following:

- Physical measures (locked filing cabinets, restricted access to offices, alarm systems);
- Technological tools (passwords and encryption, firewalls, anti-virus and anti-spyware software); and
- Organizational controls (limiting access to a “need-to-know” basis, staff training and confidentiality agreements).

8. Openness: *An organization shall make readily available to individuals specific information about its policies and practices relating to the management of personal information.*

This Privacy Policy and Consent Form is available to all clients and is provided on our website in pdf format at:

www.howlandtax.com/privacy.pdf

9. Individual Access: *Upon request, an individual shall be informed of the existence, use and disclosure of his or her personal information and shall be given access to that information. An individual shall be able to challenge the accuracy and completeness of the information and have it amended as appropriate.*

Howland Tax Services is committed to informing our clients of this Privacy Policy, and our clients are entitled to verify the accuracy of their information at any time.

10. Challenging Compliance: *An individual shall be able to address a challenge concerning compliance with the above principles to the designated individual or individuals accountable for the organization's compliance.*

Questions regarding our practice and compliance with the Ten Privacy Principles can be directed to Brad Howland as the designated Privacy Information Officer for Howland Tax Services.

Client Consent

I have read this Privacy Policy and Consent Form in its entirety and understand how my personal information will be collected, used, and protected by Howland Tax Services.

I agree that Howland Tax Services can collect and use my personal information as stated in this Privacy Policy and Consent Form.

Signature

Print Name

Date

Signature of Spouse

Print Name

Date

Howland Tax Services, Inc.

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