

# Privacy Notice

## Keiter, Stephens, Hurst, Gary & Shreaves, P.C.

### FACTS

What Does Keiter, Stephens, Hurst, Gary & Shreaves, P.C. Do With Your Personal Information?

#### Why?

Certified Public Accounting (CPA) firms, like other financial institutions, must decide how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

#### What?

The types of personal information we collect and share depend on the services you have with us. This information can include:

- Social Security number and income
- Tax return information and financial account details
- Payment history and employment information

When you are no longer our client, we continue to share your information as described in this notice.

#### How?

All financial institutions, including CPA firms, need to share clients' personal information to conduct their business. In the section below, we list the reasons CPA firms can share their clients' personal information; the reasons Keiter, Stephens, Hurst, Gary & Shreaves, P.C. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does the Firm share?	Can you limit this sharing?
For our everyday business purposes – to prepare your tax returns, provide financial advice, or respond to court orders/ legal investigations	Yes	No
For our marketing purposes – to offer our services to you	No	We don't share
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	No	We don't share
For our affiliates' everyday business purposes – information about your creditworthiness	No	We don't share
For nonaffiliates to market to you	No	We don't share

**Questions?** Call 804.747.0000 or visit [www.keitercpa.com](http://www.keitercpa.com)

### Who we are

#### Who is providing this notice?

Keiter, Stephens, Hurst, Gary & Shreaves, P.C.

### What we do

#### How does Keiter, Stephens, Hurst, Gary & Shreaves, P.C. protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include physical, electronic, and procedural safeguards, such as encryption and secure client portals.

#### How does Keiter, Stephens, Hurst, Gary & Shreaves, P.C. collect my personal information?

We collect your personal information, for example, when you

- Engage our firm for tax preparation or financial planning
- Provide information via client questionnaires or forms
- Use our online tools or client portals

We may also collect your personal information from other sources, such as your financial institutions, government agencies, or your prior CPA firm.

#### Why can't I limit all sharing?

Federal law gives you the right to limit only

- Sharing for affiliates' everyday business purposes – information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you

State laws and individual firms may give you additional rights to limit sharing.

### Definitions

#### Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- Keiter, Stephens, Hurst, Gary & Shreaves, P.C. does not share with affiliates.
- Keiter Advisors, LLC does not share with affiliates.

#### Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Keiter, Stephens, Hurst, Gary & Shreaves, P.C. does not share with nonaffiliates so they can market to you.

#### Joint Marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- Keiter, Stephens, Hurst, Gary & Shreaves, P.C. does not jointly market.