

Exact Tax Service - Privacy Policy

Privacy

Privacy encompasses the rights and obligations of individuals and organizations with respect to the collection, use, disclosure and retention of personal information. On January 1, 2004, the privacy rights of all Canadians became protected, either by federal legislation "**Canada's Personal Information Protection and Electronic Documents Act (PIPEDA)**" or by corresponding provincial legislation that is substantially similar. Business enterprises therefore have to establish policies and implement procedures to ensure the protection of this right and compliance with the requirements of the Act.

Exact Tax Service is committed to protecting the privacy of its clients and to ensuring that they know how their personal information is being used. This Privacy Policy describes how personal information about the clients may be collected, used, or disclosed.

Personal Information

Personal information is information about an identifiable individual (not companies) that includes any factual or subjective data, recorded or not, in any form.

The nature of the income tax preparation business requires Exact Tax Service to collect personal information of clients; include name, address, email address, social insurance number, personal income, investment held in various funds and personal investment income from those funds, personal worth and other personal income tax related information.

Collecting and Obtaining Consent to Use Personal Information

- a) Each year Exact Tax Service requires an update of personal information. **BY PROVIDING THEIR AND THEIR DEPENDENTS' PERSONAL INFORMATION, THE CLIENT(S) AUTHORIZE EXACT TAX SERVICE TO USE THIS INFORMATION FOR THE PURPOSE OF PREPARING AND FILING PERSONAL TAX RETURNS WITH CANADA REVENUE AGENCY.**
- b) Exact Tax Service also obtains personal information about its individual clients and about employees from the records of the companies that are the corporate clients of Exact Tax Service **THE CLIENTS, BY SIGNING THE ENGAGEMENT LETTER FOR THE COMPANY, ALSO AUTHORIZE EXACT TAX SERVICE TO THE USE OF THEIR, THEIR DEPENDENTS' AND THEIR EMPLOYEE'S PERSONAL INFORMATION FOR PREPARING AND FILING INCOME SLIPS AND SENDING INFORMATION TO CANADA REVENUE AGENCY.**

New Clients

New clients would bring in or send their personal information. **THESE NEW CLIENTS, BY GIVING THEIR AND THEIR DEPENDENTS' INFORMATION, AUTHORIZE EXACT TAX SERVICE TO ITS USE FOR THE PURPOSE OF PREPARING AND FILING PERSONAL TAX RETURNS OR TAX SLIPS WITH CANADA REVENUE AGENCY.**

Disclosure and Retention of Personal Information

Exact Tax Service does not disclose the personal information of its client without their consent to any outside party, except as required by law or as specifically requested by the client, e.g. in a mortgage letter to a broker looking for income verification.

Exact Tax Service retains the personal information for its clients for up-to seven (7) years, after which it is destroyed unless otherwise instructed by the client, in which case it is disposed of as per the client's instructions.

Ensuring Accuracy of Personal Information

Exact Tax Service is committed to maintaining the accuracy of the personal information of its clients.

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Exact Tax Service periodically reviews the accuracy of the information and makes changes after confirming it from the clients.

The clients play an active role in keeping their information up-to-date. Notification of any changes to the information is promptly updated in its record by Exact Tax Service.

Safeguard of Personal Information

Exact Tax Service has security mechanisms in place that protect against the loss, the misuse and the modification of information under its control. The electronic information is protected through the mechanisms that include firewall protection, password encryption and restricted access to the server.

Exact Tax Service instructs employees with access to the clients' personal information that it is to be used only in adherence with the principles set forth in this Privacy Policy and applicable laws. The information contained in manual working papers is secured through restriction of access only to the authorized employees of Exact Tax Service.

Exact Tax Service has a coding mechanism in place through which the manual personal information of its clients can be tracked and located.

Communicating Openly

Exact Tax Service has openly made available the privacy regulations and its Privacy Policy to the employees. It has mechanisms in place to give training to its staff and inform them of any changes in its policies and practices.

The clients are informed about the existence of our Privacy Policy either verbally or in writing and are provided a copy if they so request.

Accessing and Updating the Personal Information

The clients or their authorized representatives are provided with the summary of their Accessing and Updating the Personal Information.

The clients or their authorized representatives are provided with the summary of their personal information under the control of Exact Tax Service on verbal or written requests from the clients or their authorized representatives. The clients update their personal information verbally or in writing and they advise Exact Tax Service to make changes in their records.

Third Party Dispute Resolution

Exact Tax Service is committed to resolving disputes quickly and efficiently. In the event that the dispute cannot be settled through normal processes, Exact Tax Service is committed to using an independent third party dispute resolution process. This process can be initiated through the e-mail address www.exact-tax.ca and/or etservice1978@gmail.com. In the event the issue relates to private information; Exact Tax Service will not use or distribute any private information without express permission. All disputes in arbitration will be resolved under the laws of Ontario.

Change of Privacy Commitment and Feedback

Exact Tax Service continually monitors and strengthens its Privacy Policy. In case of any change in its Policy, it will inform all its clients either verbally or in writing.

If, at any time, the clients have questions or concerns about Exact Tax Service's Privacy Policy, they may send email to Exact Tax Service at etservice1978@gmail.com or mail to Exact Tax Service 164 Rathburn Road, Etobicoke, Ontario, M9B 2L4.