



PRIVACY POLICY

In compliance with the Gramm-Leach-Bliley Act, Public Law 106-102 (FTC 16 CFR Part 313), we are required by law to inform you of our privacy policy formally. This Privacy Notice discloses the privacy practices for Orion United Professional Tax Services, LLC (OUPTS, LLC), and our website: www.orionunited5.com. We are committed to keeping all personal information collected of those individuals who visit our facility and website in an accurate, confidential, secure, and private manner according to IRS Publication 4557, Safeguarding Taxpayer Data. Our privacy policy's design ensures those affiliated with OUPTS, LLC of our commitment, and our obligation to meet and exceed most existing privacy standards.

This Privacy Policy shall govern all data collection and usage thereof. It will explain what information we will collect from you and how we may disclose and protect this information. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Collection of Information

We collect nonpublic personal information to prepare your tax return accurately. The collected information may include your name, address, date of birth, social security number, income, expenses, and other personal information about you and your dependents that will be needed to prepare your income tax return correctly. We may also collect other nonpublic personal information such as bank information for any bank product you may choose.

Website

The website will also collect various information types, such as third-party tracking technologies and server logs. Other information could include IP addresses or types of operating systems to assist us in providing and maintaining a superior quality of service.

Disclosure of Information

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client. We do not sell or rent your personal information to third-party direct marketers.

OUPTS, LLC maintains policies and procedures restricting access to your nonpublic personal information. These include physical security, records retention, computer, and communication security, to include password protection and data management to ensure restricted physical and electronic access to the personal information we have in our possession.

We may use your personal information to apprise you about products and services available through OUPTS (with your permission).

This Privacy Policy and other policies within this notice may be changed as required by law. We will notify you of any material changes via email, website, or United States Postal Service.