



**CLIENT CONFIDENTIALITY**

I, Bijan Kohanzad, EA am privileged to be a federally authorized tax practitioner and bring you the following client confidentiality measures we take in our office:

1. Our computers and networks have a firewall, up-to-date virus protection, and other electronic controls such as data encryption.
2. Our Network design and servers are continuously monitored by Amazon Cloud Services technology engineers for security breach.
3. Our servers are off site with redundant back up with no access of our staff at Amazon Cloud.
4. We Access our data remotely via a secured “Virtual Private Network” tunnel only from our office computers. None of the staff members are able to login remotely from any other computers, except computers only located in our office with limited access.
5. All of our data is continuously backed up to our off line secured data center daily which are monitored on a continuous bases.
6. In our office we shred all CDs and papers that contain any important and sensitive information.
7. Our office is fully paperless.
8. Our staff is continuously trained on the high importance of client confidentiality through continuous training.
9. In our office suite we have a private conference room where we conduct client interviews. During a client interview, each one of our staff members keep only the interviewee’s documents at their desk.
10. Our phone calls are recorded periodically for quality control purposes.
11. Our entire office staff maintains full client confidentiality on social networking sites such as Facebook and Twitter.
12. If a client posts a comment or question that might suggest a conversation of Tax information, we never respond or participate in the chat.

13. Our staff members verify client identity before sharing or discussing any client information according to Gramm-Leach-Bliley Act.
14. By giving tax advice, you as a client are informed that the information exchanged between you and us are privileged and by inadvertently sharing information you may lose that privilege.
15. Our clients know they cannot call and have us fax a copy of their tax return to a third party without a specific authorization disclosure and we will not do so under any circumstances.
16. We do not share our client's personal information with any outside sources.

I/We, \_\_\_\_\_ am/ are in receipt of OptimaNet Tax  
Services Confidentiality policy.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date