

Privacy & Security Statement

Effective Date: November 1, 2025

Last Updated: November 12, 2025

1. Our Commitment to Your Privacy

At **Comprehensive Business Services**, we value your trust and are committed to protecting the privacy and security of your personal and financial information. We collect only the information necessary to provide professional tax, bookkeeping, and advisory services and safeguard it according to the highest industry standards.

2. Information We Collect

We may collect the following types of information:

- **Personal Information:** Name, address, email, phone number, date of birth, and taxpayer identification numbers.
- **Financial Information:** Bank account data, payroll details, tax forms, financial statements, and other documents required to deliver our services.
- **Technical Information:** Website usage data, IP addresses, cookies, and browser information to improve user experience and site performance.

We collect this data directly from you, through secure uploads, forms, or our secure client portal.

3. How We Use Your Information

Your information is used strictly for:

- Preparing and filing tax returns.
- Providing accounting, bookkeeping, and advisory services.
- Managing client relationships and billing.
- Complying with federal and state legal requirements.

We do **not** sell, rent, or disclose your information to any third parties for marketing purposes.

4. Information Sharing and Disclosure

We may share your information only in the following cases:

- With your explicit consent.

- With authorized third parties who assist in delivering services (e.g., IRS-authorized e-filing platforms, QuickBooks Online integrations), subject to confidentiality agreements.
- As required by law, regulation, or court order.

All vendors handling your information are required to maintain strict confidentiality and data protection safeguards.

5. Data Security

We employ advanced technical, physical, and administrative measures to protect your information:

- **Encryption:** All transmitted and stored data are encrypted using industry-standard SSL/TLS and AES-256 encryption.
- **Access Control:** Client data access is restricted to authorized personnel only.
- **Secure Portals:** All document uploads and communications occur within password-protected, encrypted client portals.
- **System Monitoring:** We use firewalls, intrusion detection, and multi-factor authentication to prevent unauthorized access.
- **Secure Disposal:** Records are permanently deleted or anonymized at the end of the retention period in accordance with IRS and professional guidelines.

6. Your Rights and Choices

You may:

- Review or correct your personal information by contacting us directly.
- Request that we delete your personal data (subject to record retention laws).
- Opt out of non-essential communications at any time.

7. Data Retention

We retain client records only as long as necessary to fulfill service obligations and comply with IRS Circular 230 and record retention requirements, generally a minimum of **seven (7) years**.

8. Cookies and Website Analytics

Our website uses cookies for functionality, performance analysis, and security. You can disable cookies through your browser settings; however, some features may not operate properly without them.

9. Links to Other Websites

Our website may contain links to third-party sites. Comprehensive Business Services is not responsible for the privacy or security practices of those websites. We encourage you to review their respective privacy policies.

10. Updates to This Policy

We may update this Privacy & Security Statement periodically. Updates will be posted on this page with a new “Effective Date.” Continued use of our site constitutes acceptance of the revised policy.

11. Contact Us

If you have any questions about our privacy or security practices, please contact:

Comprehensive Business Services

Email: [info@cbstaxpro.com]

Phone: (302) 994-2000 ext 302

Website: <https://www.cbstaxpro.com>

Mailing Address: 112 Capitol Trl Newark DE 19711