

Privacy Policy

Regan Accounting & Tax

Last updated: October 16, 2026

Regan Accounting & Tax ("we," "us," "our") respects your privacy. This policy explains what information we collect through our website and in the course of providing accounting, bookkeeping, tax preparation, and advisory services, and how we use and protect it. As a tax and accounting firm, we are considered a financial institution under the Gramm-Leach-Bliley Act, and this policy also serves as our privacy notice to clients. It applies to current and former clients alike.

Information we collect

- **Information you give us:** name, email, phone number, and any details you choose to share with us, such as through a contact form on our website, by email, by phone, or in person. We only receive what you submit.
- **Client information:** to provide our services we may collect Social Security numbers, dates of birth, income and financial records, tax documents (such as W-2s and 1099s), bank and payment information, and business financial records.
- **Information from others, with your authorization:** such as your employer, banks, brokerages, prior tax preparers, or IRS and state tax transcripts.
- **Website data:** simply browsing our website does not require you to give us any personal information. Like most websites, our hosting provider automatically processes basic technical information (such as IP address, browser type, and the pages requested) to deliver the site and protect it from abuse and security threats. We do not use this information to identify or profile visitors.

How we use your information

- To respond to inquiries and provide the services you request
- To prepare and file tax returns and maintain accurate financial records
- To communicate with you about your account, deadlines, and invoices
- To comply with legal, regulatory, and professional obligations

We do not sell your personal information, and we do not share it with outside companies for their own marketing.

Tax return information

We treat tax return information as confidential under Internal Revenue Code §7216 and related Treasury regulations. We will not use or disclose your tax return information for any purpose other than preparing your return without your written consent, except as permitted by law.

Who we share information with

We do not disclose nonpublic personal information about current or former clients to anyone except as permitted by law or by the AICPA Code of Professional Conduct, which also requires us to keep client information confidential. Because we share only in these permitted ways, there is nothing you need to opt out of. Permitted sharing includes: - **Taxing authorities**, such as the IRS and state departments of revenue, when filing returns or responding to notices for you - **Secure third-party service providers** who help us operate, such as providers of client portal, tax and accounting software, email, payment processing, and website hosting services. These providers may use your information only to provide services to us and are required to protect it. - **AI-assisted tools**, only as permitted by law and, where required, with your signed consent - **Others when required by law**, such as in response to a subpoena or court order, or at your direction

How we protect your information

We maintain a written information security plan in line with the FTC Safeguards Rule and IRS Publication 4557. Safeguards include an encrypted client portal for uploads, multi-factor authentication, access limited to authorized team members, and secure disposal of records. No method of storage or transmission is 100% secure, but we take reasonable steps to protect your information.

Cookies and analytics

Our website does not use advertising or tracking cookies, and we do not use analytics tools, tracking pixels, or similar technologies to monitor how visitors use the site. Our hosting and security provider may set a strictly necessary security cookie in limited cases, for example to help tell real visitors apart from automated bots. These cookies are not used for tracking or advertising. If we ever add analytics or tracking tools, we will update this policy first.

Email and text messages

We may contact you by email, text, or through our client portal about your account, documents, deadlines, and invoices. Please do not send Social Security numbers or tax documents by regular email or text; use our secure client portal instead. We will never ask for your password or payment by gift card. If we send newsletters or marketing emails, you can unsubscribe at any time using the link in the email or by contacting us.

Links to other websites

Our website may link to other sites, such as our client portal, payment pages, the IRS, or social media. We are not responsible for the privacy practices of those sites, so please review their policies.

If a data breach occurs

If we learn that your personal information was accessed without authorization, we will notify you as required by South Carolina law and other applicable state laws, and report the incident to the IRS and other authorities as required.

Your choices

You may ask to review or update your information, or ask how it is used, by contacting us. If you choose not to share certain information, some services may not be possible.

Residents of some states, such as California, may have additional rights under state privacy laws, including the right to know what information we hold, to correct it, and to request deletion (subject to records we must keep by law). We will not treat you differently for exercising these rights. To make a request, email us; we may need to verify your identity first.

Record retention

We keep client records as long as needed to provide services and meet legal and professional requirements, generally at least seven years, and then dispose of them securely.

Children's privacy

Our website is not directed to children under 13, and we do not knowingly collect their information online.

Changes to this policy

We may update this policy from time to time. The "Last updated" date above shows the latest revision.

Questions?

Questions about your privacy or this policy? Get in touch at info@reganaccountingandtax.com.