

In order to comply with the requirements of the Gramm-Leach-Bliley Act of 1999, as amended, I am writing this letter to inform you of our firm's privacy policy.

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax organizers, worksheets, and other documents,
- Information that you share in phone calls, electronic files, letters, e-mails, and fax transmissions, and
- Information about your transactions with us, our affiliate, or others.

In the interest of facilitating our services, Lottsa uses a number of electronic devices, the internet, and third-party vendors to exchange information, store data, and submit tax returns. This may include the exchange of your personal data. Our firm employs measures designed to maintain data security, and we choose vendors who are committed to the same.

We do not disclose any nonpublic personal information about our clients or former clients to any non-affiliated person or firm except as required by law. Our sole affiliate is Lottsa Financial Services, Inc (LFS). Scott Beers is the majority owner of LFS and is also the principal in this company. The employees of LFS are also employees of Lottsa Tax & Accounting Services, Inc. We just cannot forget what we know of you from the tax practice when we change hats and are working in the financial planning business.

We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information.

Simply put, we limit any exchange of your information to the platforms and tools that we have identified as necessary to complete the work for which we have been engaged. We will not release personal information to any other party without your explicit permission unless we are compelled to do so by law. Your confidence in us is crucial. We want you to know that your personal and account information is safe. Honesty, integrity, and discretion are qualities we cherish and strive to practice in all our activities.

If you have any questions about this policy, please contact me directly by phone 612-338-7459 or by e-mail [scott@lottsa.com](mailto:scott@lottsa.com).

Sincerely,



Scott Beers, E.A., CFP®  
*President of Lottsa*

## **Lottsa**

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