

Our Privacy Policy

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

- Information we receive from you on tax preparation worksheets, plus other documents we use in preparing your tax, or other forms.
- Information about your transactions with us or with others; and
- Information we receive from a consumer-reporting agency.

We may disclose the information we collect, described above, to companies that perform marketing services on our behalf or to other financial institutions with whom we have joint marketing agreements.

We do not disclose any nonpublic personal information about you to anyone, except as permitted by law.

If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices described in this notice.

We restrict access to your personal and account information to those employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

Your confidence in us is important and we want you to know that your personal and account information is safe. If you have any questions or concerns please contact us at (858) 483-1465.

The undersigned acknowledge(s) receipt of a copy of this notice.

Applicant

Date

Applicant

Date