

EDWIN VENEZUELA TAX ADVISORS LLC
Privacy Policy

Last Updated: November 3, 2025

Introduction

This Privacy Policy explains how EDWIN VENEZUELA TAX ADVISORS LLC ("EVTA," "we," "us," or "our") collects, uses, shares, and safeguards personal information in connection with our website and tax advisory services.

1) Personal Information We Collect

We collect the following categories of information:

- Identifiers: name, email address, phone number, state/country, and similar identifiers.
- Professional information: business name, role/title, and similar details you provide.
- Financial/tax context information (advisory only): high-level descriptions of your tax situation shared during consultations. We do not request Social Security Numbers or full tax returns through the public website forms. If such information is needed for an engagement, we will provide secure transmission methods.
- Technical data: IP address, device/browser type, pages visited, and cookies/analytics data.
- Communications: messages you send us (email or contact forms), appointment details, and feedback.

We do not knowingly collect sensitive personal information (e.g., SSN, driver's license number, precise geolocation, health data) via the public website. Do not submit such data unless we explicitly request secure transfer in writing as part of a client engagement. Information collected in connection with providing financial services may be subject to the Gramm-Leach-Bliley Act (GLBA) and therefore exempt from certain state privacy laws to the extent GLBA applies.

2) How We Use Personal Information

We use information to:

- Provide and improve tax advisory services;
- Communicate with you (scheduling, confirmations, updates, invoices);
- Respond to inquiries and provide educational content;
- Operate, secure, and improve our website and user experience;
- Comply with legal obligations and enforce our agreements;
- Send optional marketing communications (you may opt out at any time);
- Prevent fraud, security incidents, and misuse of our services.

3) Legal Bases (EEA/UK Users)

If you are in the EEA/UK, we process personal data on these legal bases: (a) contract (to provide requested services); (b) legitimate interests (site security, improvement, communications); (c) consent (where required for marketing/cookies); and (d) legal obligations.

4) Sharing of Information

We may share information with:

- Service providers who assist with hosting, email, scheduling, payments, document management, analytics, and communications, under confidentiality obligations;
- Professional advisors (e.g., legal counsel) as necessary;
- Authorities when required by law, subpoena, or to protect rights, property, or safety;
- Business transfers in connection with a merger, acquisition, or sale of assets.

We do not sell or share personal information (as "share" is defined under the California Consumer Privacy Act, as amended by the CPRA). We do not use or disclose sensitive personal information for purposes other than those permitted by law.

5) Cookies and Analytics

We use essential cookies for site functionality and may use analytics cookies to understand usage patterns. You can adjust browser settings to block or delete cookies; some features may not function properly without cookies. Where required by law, we will obtain your consent before setting non-essential cookies and provide a way to withdraw consent.

6) Data Security

We implement reasonable administrative, technical, and physical safeguards appropriate to the nature of the information we process. However, no method of transmission or storage is completely secure. Do not email sensitive data unless we authorize secure methods.

7) Data Retention

We retain personal information only as long as necessary for the purposes described in this Policy, to comply with legal obligations, resolve disputes, and enforce agreements. If you become a client, our engagement letter may specify additional retention practices.

8) Your Choices and Rights

- Marketing communications: You may opt out by following unsubscribe instructions or contacting us.
- Access/Deletion/Correction: Subject to applicable law, you may request access to, deletion of, or correction of your personal information by emailing edwinvenezuelataxadvisor@gmail.com. We may need to verify your identity.
- EEA/UK: You may have additional rights (restriction, portability, objection, and to withdraw consent). You may also lodge a complaint with your local data protection authority.

- U.S. State Privacy Rights (CA/CO/CT/UT/VA and similar): Depending on your state, you may have rights to know/access, correct, delete, opt out of certain processing (e.g., targeted advertising, sale, or profiling), and appeal denied requests. We do not sell or share personal information. To exercise rights or appeal a decision, email edwinvenezuelataxadvisor@gmail.com with "Privacy Request" in the subject line. We will not discriminate against you for exercising your rights.
- Authorized Agents (CA): If you use an authorized agent, we may require proof of authorization and verification of your identity.

9) Children's Privacy

Our site and services are not directed to children under 13 (or under 16 in the EEA/UK). We do not knowingly collect personal information from children. If you believe a child has provided us information, contact us to request deletion.

10) International Data Transfers

If you access the site from outside the United States, your information may be processed in the U.S. and other countries with different data protection laws. Where required, we use appropriate safeguards for cross-border transfers (for example, EU Standard Contractual Clauses).

11) Third-Party Websites

Our site may link to third-party websites. We are not responsible for their privacy practices. Review those policies before providing personal information to third parties.

12) Changes to This Privacy Policy

We may update this Policy from time to time. The "Last Updated" date indicates the effective date. Your continued use of the site after changes signifies acceptance of the revised Policy. If we make material changes, we will provide additional notice as required by law.

13) Contact Us

If you have questions about this Policy or our data practices, contact edwinvenezuelataxadvisor@gmail.com.

14) U.S. State Supplement for California and Other States

Categories Collected: Identifiers; professional information; internet/technical activity; communications; limited financial context for advisory purposes only.

Sources: Directly from you; your devices (cookies/analytics); service providers.

Purposes: As described above, including providing services, security/fraud prevention, compliance, and improvement.

Disclosures: To service providers and as otherwise described above. No sale or sharing of

personal information.

Retention: We retain information only as long as reasonably necessary for the purposes disclosed (see Section 7).

Do Not Track: We do not respond to DNT signals.

Nevada: We do not sell covered information as defined under Nevada law.