



Schaaf CPA Group, LLC Privacy & SMS Policy

1. Introduction

At **Schaaf CPA Group, LLC**, your privacy and the security of your personal information are of utmost importance. This policy outlines how we collect, use, and protect your information, including SMS/Text Communications.

2. Information We Collect

We may collect personal information, including but not limited to:

- Name, address, and contact information (email, phone number)
- Financial information relevant to services provided
- Mobile phone numbers for SMS communications

We collect this information only to provide, improve, and personalize our services.

3. How We Use Your Information

Your information is used to:

- Provide and manage accounting and tax services
 - Communicate important updates regarding your account
 - Send reminders, confirmations, and service notifications
 - Comply with legal and regulatory obligations
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4. Sharing Your Information

- Your personal information will **not** be sold or shared with third parties for marketing purposes.
 - We may share information with trusted service providers only as necessary to provide our services, under strict confidentiality agreements and with your consent.
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5. SMS/Text Messaging

Purpose of SMS Communications

By opting in, you consent to receive one-to-one text messages from **Schaaf CPA Group, LLC** staff. These messages may include:

- Appointment reminders
- Confirmations
- Tax Return Status updates
- Follow-up communication

Message Frequency

The number of messages you receive may vary based on your interactions with our staff.

Opt-Out

You may cancel text messaging at any time by replying **STOP**. Once processed, a confirmation message will be sent, and you will no longer receive text messages from us.

Help & Support



For assistance with SMS communications, reply **HELP** or contact us at **317-867-5427**
Message and data rates may apply depending on your mobile carrier plan.

6. Security of Your Information

We implement industry-standard security measures to protect your personal information, including secure servers, encryption, and access controls. While we strive to safeguard your data, no transmission over the internet or storage system can be guaranteed to be 100% secure.

7. Your Rights

You have the right to:

- Access your personal information
- Request corrections to inaccurate data
- Opt out of communications
- Request deletion of your information, where legally permissible

To exercise any of these rights, please contact us at 317-867-5427

8. Policy Updates

We may update this policy from time to time. Any changes will be posted on our website. Continued use of our services after updates constitutes your acceptance of the revised policy.

Contact Us

For questions or concerns about this Privacy & SMS Policy, contact:

Schaaf CPA Group

Phone: **317-867-5427**