

Privacy Policy of Ledger Technologies, LLC

Revised as of December 11, 2025

Ledger Technologies, LLC (“we,” “us,” “our”) is committed to protecting your privacy and maintaining the confidentiality of the information you provide to us. This notice describes our policies for safeguarding your personal information and applies to current, former, and prospective clients.

1. Our Commitment to Your Privacy

It is our policy to keep all information we collect from you confidential. We restrict access to nonpublic personal information to authorized personnel who need that information to provide services to you and who are bound by confidentiality obligations.

2. Information We Collect

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

- Information you provide on tax organizers, worksheets, federal and state reporting forms, and other documents used in tax preparation or related financial services.
- Information about your transactions with us, our affiliates, or others.
- Information received from outside agencies such as banks, brokerage firms, or other third-party institutions involved in your financial matters.

3. How We Use Your Information

We use your information for:

- Administering our business operations
- Preparing and filing your tax returns
- Providing accounting, advisory, payroll, and related services
- Processing your payments
- Improving our website, services, and client communications
- Complying with federal and state regulations

We may also use aggregated, non-identifiable data for analytical and operational purposes. Personally identifiable information is **not** shared except as permitted or required by law.

4. When We May Disclose Your Information

We do **not** disclose any nonpublic personal information about our clients or former clients except as permitted or required by law, or as authorized by you in writing. Disclosures may include:

- Compliance with federal, state, or local laws
- Compliance with national, state, or local licensing rules
- Responding to court orders, subpoenas, or regulatory inquiries
- Items you authorize us to disclose in writing
- Information you authorize us to disclose for electronic filing of your tax return
- Information you authorize us to disclose to confirm that you are a client, without revealing financial or personal details

If disclosure of potentially privileged communication is requested, we will not provide such information unless required by law and will allow you an opportunity to assert privilege.

We do **not** share, sell, lend, or lease information that uniquely identifies you (such as email addresses or other personal data) except as necessary to process transactions or deliver services you have requested.

5. Safeguarding Your Information

We take reasonable physical, electronic, and procedural steps to maintain the privacy and security of your information. These safeguards include secure technology, confidentiality agreements, and restricted access to data. However, no system can guarantee absolute protection from risks such as fire, theft, computer failure, or events beyond our control.

Privacy Policy Cont.

6. Your Rights

You have the right to request access to, review, copy, and request corrections to the information we maintain.

7. Email Information

If you choose to correspond with us via email, we may retain the content of your messages, your email address, and our responses. We apply the same protections to electronic communications that we use for information received by mail or phone.

Email is **not a secure method** for transmitting highly sensitive information such as Social Security numbers, bank statements, brokerage statements, or mortgage records. Such information should be transmitted through secure upload portals or encrypted channels.

8. Website Use Information

Our website uses standard technologies such as cookies and web server logs to understand how the site is used.

Information collected may include:

- Dates and times of visits
- Pages viewed
- Time spent on the site
- Websites visited before or after visiting ours

We use this information to improve our website and tailor it to client needs.

9. Sharing and Selling Information

We do not share, sell, lend, or lease any information that uniquely identifies a user, except when necessary to process transactions or provide services you have requested.

10. Links to Other Websites

Our website may contain links to other sites. We are not responsible for the privacy practices, content, or policies of these external sites. Once you leave our website, those sites' privacy policies apply. We encourage you to review their policies before proceeding.

11. Acquisition or Change of Ownership

If our firm or a substantial portion of its assets is acquired, your information may be transferred as part of that transaction. Rest assured, the protections in this Privacy Policy will continue to apply.

12. Changes to This Policy

We provide notice of our Privacy Policy at least annually. We may amend this policy as laws, regulations, or business practices change. If material changes are made, we will notify you before they take effect. You may request the most recent version at any time.

13. Questions or Concerns

If you have questions about this policy, please contact our office. A current version of this Privacy Policy is also published on our website.

If you believe your tax return information has been improperly disclosed or used without your permission, you may contact the **Treasury Inspector General for Tax Administration (TIGTA)**:

- **Phone:** 1-800-366-4484
- **Email:** complaints@tigta.treas.gov