

Privacy Policy
Scott A. Goffstein & Associates, LLP

At Scott A. Goffstein & Associates, LLP, your privacy is important to us. While information is the cornerstone of our ability to offer excellent service, Scott A. Goffstein & Associates, LLP recognizes our most important asset is our customers' trust. We are particularly concerned about the privacy of our individual customers who obtain financial services from us for personal, family, or household purposes ("you"). This notice provides you with our privacy policies and practices with respect to the disclosure of nonpublic information about you.

Information We May Collect

In providing you with financial services, we collect nonpublic personal information* about you from the following sources:

- Information we receive from you on applications, tax returns, net worth statements, or other forms
- Information about your transactions with us or others
- Information we receive from a consumer-reporting agency.

*Nonpublic personal information means personally identifiable financial information that is not publicly available.

Information We May Disclose And To Whom We May Disclose

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

Under Massachusetts law, if you provide us with information which you identify as confidential pursuant to a professional engagement with us, we are not permitted to disclose that information without your consent, except in response to a court proceeding, to the Massachusetts Board of Public Accountancy, or in the course of quality reviews of our firm.

If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies and practices as described in this notice as well as the Firm's Record Retention and Destruction Policy.

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

This Privacy Policy applies to nonpublic personal information about individuals who obtain financial services primarily for personal, family or household purposes.

We reserve the right to change this Privacy Policy, and any of these policies described above, at any time.

If you have any questions about this Privacy Policy, please call (781) 398-1770.