

Privacy Policy & SMS Text Messaging Disclosure

Duenas Tax LLC

Introduction

Duenas Tax LLC (“Duenas Tax,” “we,” “our,” or “us”) is committed to safeguarding the confidentiality of your personal and financial information. This Privacy Policy explains how we collect, use, protect, and disclose your information, including information related to SMS (text message) communications, in compliance with the Gramm-Leach-Bliley Act of 1999 and applicable federal and state laws.

Information We Collect

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

- Information you provide on applications, tax organizers, worksheets, intake forms, and other documents
- Information about your transactions with us, our affiliates, or others
- Information received from consumer reporting agencies, when applicable

When you opt in to receive SMS communications, we may also collect your mobile phone number, message content and timestamps, and communication preferences. This information is collected solely for the purpose of providing professional tax, accounting, advisory, payroll, bookkeeping, and related services.

Use of Information

Your information may be used to:

- Prepare and file tax returns
- Provide tax planning and advisory services
- Respond to IRS, FTB, EDD, CDTFA or other agency matters
- Communicate regarding appointments, deadlines, notices, payments, and account updates
- Deliver customer service and administrative communications via SMS, email, or client portal

Client Portal & Cloud Storage (TaxDome)

Duenas Tax uses TaxDome, a secure, encrypted client portal and document management system, to store and manage client information and facilitate secure communication.

Documents and personal data uploaded to the portal are stored on secure cloud servers with industry-standard encryption and security safeguards. Access to your information is restricted to authorized personnel who require access to provide services to you.

By using our client portal, you acknowledge and agree that electronic communications and document storage will occur through this secure third-party platform.

SMS Consent & Communications

By providing your mobile phone number to Duenas Tax, you consent to receive SMS (text) messages from us. These communications may include appointment confirmations and reminders, requests for documents or signatures, updates regarding tax filings, audits, or notices, and payment reminders.

Message frequency may vary based on your engagement with our firm. Consent to receive SMS messages is not a condition of purchasing services.

You may opt out at any time by replying STOP to any message. For assistance, reply HELP or contact our office directly. Standard message and data rates may apply depending on your mobile carrier.

Disclosure of Information

We do not disclose any nonpublic personal information about our clients or former clients except as permitted or required by law.

We do not sell, rent, or share your personal information or SMS data with third parties for marketing purposes.

Information may be shared only with trusted service providers, such as secure portal providers, tax software platforms, payroll processors, or cloud storage providers, that assist us in delivering services and are contractually obligated to maintain confidentiality and security standards.

Information Security

We restrict access to nonpublic personal information to authorized members of our firm who need that information to provide services.

We maintain physical, electronic, and procedural safeguards that comply with federal regulations to protect your personal information from unauthorized access, use, or disclosure.

Online information is stored using secure, encrypted systems, including TaxDome and CPA Website Solutions SOC 1-certified data centers.

Eligibility

You must be at least 18 years old to consent to receive SMS communications from Duenas Tax.

Changes to This Policy

We may update this Privacy Policy from time to time. Any updates will be posted on our website with a revised effective date.

Contact Information

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