

Privacy Policy for Oceanside Tax Services

Effective Date: January 1, 2022

Oceanside Tax Services ("we," "us," or "our") is committed to protecting the privacy and confidentiality of our clients' personal information. This Privacy Policy explains how we collect, use, disclose, and protect your information in compliance with Canada's privacy laws, including the **Personal Information Protection and Electronic Documents Act (PIPEDA)**.

1. What Personal Information We Collect

We collect personal information necessary to provide tax preparation and related services. The types of personal information we may collect include:

- **Contact Information:** Name, address, phone number, and email.
 - **Identification Information:** SIN (Social Insurance Number), date of birth, and government-issued ID.
 - **Financial Information:** Income details, tax slips (T4, T5, etc.), employment records, investment information, and other relevant tax documents.
 - **Banking Information:** Account details for tax refunds or payment arrangements.
 - **Other Information:** Any additional details you provide that are required for tax filings and related services.
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2. How We Use Your Personal Information

We use your personal information for the following purposes:

- To prepare and file your tax returns accurately and efficiently.
 - To provide tax planning, advice, and other services you request.
 - To communicate with you about your tax filings, refunds, and related updates.
 - To comply with legal obligations, such as reporting requirements under tax laws.
 - To improve our services and respond to your inquiries.
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3. How We Collect Your Personal Information

We collect your information in the following ways:

- **Directly from you:** When you provide information in person, via phone, email, or through forms.
 - **Third parties:** With your consent, we may collect information from employers, financial institutions, or the Canada Revenue Agency (CRA).
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4. Consent

By engaging our services, you consent to the collection, use, and disclosure of your personal information as outlined in this policy, including information exchanges with the Canada Revenue Agency (CRA). You may withdraw your consent at any time; however, this will limit our ability to provide tax-related services.

5. Disclosure of Personal Information

We do not sell or trade your personal information. We may share your information only in the following circumstances:

- With the **CRA** or other government authorities as required by law.
 - With trusted **third-party service providers** who assist us in delivering tax preparation services (e.g., software providers).
 - To comply with legal obligations such as subpoenas, court orders, or audits.
 - With your **explicit consent** for other purposes.
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6. Protecting Your Information

We take the security of your personal information seriously. We implement physical, administrative, and technical safeguards to protect against loss, theft, unauthorized access, or misuse. Measures include:

- Secure file storage (physical and digital).
 - Encrypted email and data transfers.
 - Restricted access to your personal information.
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7. Retention of Personal Information

We retain your personal information for as long as necessary to fulfill the purposes outlined in this policy and to comply with legal and regulatory obligations (e.g., CRA retention rules).

8. Your Rights

You have the following rights regarding your personal information:

- **Access:** You may request access to the personal information we hold about you.
- **Correction:** You can request corrections to inaccuracies in your personal information.
- **Withdraw Consent:** You may withdraw consent for the use of your information, subject to legal or contractual restrictions.

To exercise your rights, please contact us using the details below.

9. Contact Us

If you have any questions or concerns about this Privacy Policy or how we handle your personal information, please contact us:

Oceanside Tax Services
PO Box 361 STN Main, Parksville, BC, V9P 2G5
Phone: 250-248-5508
Email: help@OceansideTaxes.com
Website: www.OceansideTaxes.com

10. Policy Updates

We may update this Privacy Policy from time to time. Any changes will be posted on our website, and the updated policy will include the "Effective Date." Please review it periodically to stay informed about how we protect your information.

Thank you for trusting Oceanside Tax Services with your tax preparation needs. Your privacy is important to us!