

LISA J. IHANDER, CPA LLC  
131 NW HAWTHORNE AVE, SUITE 106  
BEND, OREGON 97703

---

**2025 Privacy Policy and Consent Disclosure**

Tax Preparer: Lisa J Ihander, CPA  
Tax Year: 2024

**The purpose of this disclosure includes:**

Your signature on the engagement letter grants the firm above permission to send you a tax organizer, newsletters, ShareFile notices, tax planning documentation and other matters related to you. This also permits the preparer to utilize a third-party software intermediary for document storage and to process your e-filed tax returns.

**The tax return information that will be disclosed:**

- Specific tax advice or tax planning information for 2025.
- Information from the preparation of your 2024 tax returns, and previous years.
- The third-party software intermediaries will assimilate your 2024 tax returns, and/or previous years into the required format for electronic submission of your tax returns to the Internal Revenue Service and the appropriate state tax filing agency, and your final tax returns will be stored on an encrypted server for final storage and client/preparer access.

**Types of nonpublic personal information collected:**

Our firm collects nonpublic personal information about you that is provided by you or obtained with your authorization.

**Other parties to whom information is disclosed:**

Our firm does not disclose any nonpublic personal information obtained about current or former clients except where required or permitted by law. Permitted disclosures include provided required information to our firm's employees, and in limited situations, to unrelated third parties who need to know that information to assist our firm in providing services to you. In all such situations, our firm stresses the confidential nature of information being shared.

Our office does not collect any information about our clients, except for contact information or information provided by the client for the express use of producing an accurate and timely tax return. Our office does not recommend sending any non-public or confidential information through emails, as that information cannot be guaranteed privacy. Under no circumstances will any information collected, directly or indirectly, by our office be provided to a third party without the express written permission of the client. Our office uses a third-party site to host our file sharing services (Citrix Systems, Inc.). Contact or visit the host's website or company for information regarding their Privacy Policies. Lisa J. Ihander, CPA LLC is not responsible for or liable for any information that may or may not be used by or collected by Citrix Systems, Inc. or Microsoft, their subsidiaries, or related third parties.

**Protecting the confidentiality and security of information:**

Our firm retains records relating to professional services that are provided so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

All confidential information sent to you or third parties (at your direction), as well as the portal will be password protected. While we will use our best efforts to keep such communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and consent to our use of these devices.

Federal law requires this policy be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to grant the above permissions. The above firms' services (i.e., tax preparation, consulting, etc.) are not conditional upon your consent. However, the above firm will be unable to e-file your tax returns and you will need to file paper returns with the taxing authorities. In addition, the above firm will not be able to mail a tax organizer for 2025, allow ShareFile storage or provide you access to electronic documents. If you do not specify the duration of your consent or if you do not express rejection to this consent in writing, your consent is valid for one year or until April 15, 2026, upon the signing of the 2024 Engagement Letter.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).