

Privacy Policy

Effective Date: June 02, 2025

Rosemary Tax LLC

1. Information We Collect

We collect only the information necessary to provide you with tax, accounting, financial consulting, or other client services. This may include your name, contact details, and financial documents you voluntarily provide. We do not collect personal data without your consent.

2. Use of Information

The information you provide is used solely to deliver our professional services, comply with legal obligations, or respond to your inquiries. We do not sell or share your personal information with third parties for marketing or advertising purposes.

3. Data Protection & Security

We follow industry-standard security protocols to protect the confidentiality and integrity of your data, in accordance with:

- The FTC Safeguards Rule;
- The Gramm-Leach-Bliley Act (GLBA);
- IRS Publication 4557;
- And any other applicable federal and state privacy and consumer protection laws.

While we limit internal access to your information and monitor our systems, we do not disclose the exact technologies or tools used, for your safety and ours.

4. Limited Disclosure to Third Parties

We only share your data with third-party service providers or government agencies when:

- Required by law (e.g., tax filing or audit support),
- Necessary to complete services you've authorized,
- Or as directed by you in writing.

All third parties we work with are under contractual obligations to maintain strict confidentiality and data protection.

5. Data Retention

We retain client records for the legally required period. After that, your data is securely deleted or archived, in line with IRS and FTC guidelines.

6. Your Rights

You have the right to request access to your personal information, ask for corrections, or withdraw consent for data use (as long as doing so does not conflict with legal or regulatory obligations). To make a request, contact us at the details below.

7. Children's Privacy

Our services are intended for adults. We do not knowingly collect personal information from anyone under 18 years old.

8. Updates & Accessibility

This Privacy Policy may be updated from time to time. We will post any changes on this page with the updated date. For transparency, this policy is always available in the footer of our website and may be pinned to our social media accounts where applicable.

9. Contact Us

If you have any questions about this policy or your data, please contact:

Rosemary Tax LLC

Email: operations@rosemarytax.com

Phone: (305) 712-2414

Address: 66 W Flagler Street, Suite 900, PMB 11590, Miami, FL 33130