

TREY FOOTE FOUNDATION



TREYFOOTE
FOUNDATION

Privacy Statement

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Purpose.

The Board of Directors of the Trey Foote Foundation (the Foundation) recognizes that privacy is of utmost concern to supporters, donors, and corporate sponsors. Foundations and Non-Profit organizations are now required by law to inform their clients of their policies regarding privacy of client information. Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. A recent law change requires Non-Profit organizations to disclose our Privacy Policy to you which we are more than happy to do. We hope that by taking a few minutes to read it, you will have a better understanding of what we do with the information you provide us and how we keep it private and secure. We have always safeguarded the confidentiality of information provided to us by our clients and are bound by our professional standards to continue to maintain this vital aspect of our professional relationship, members, officers, and volunteers (Personnel) of the Foundation.

A. Types of Information We Collect

We collect certain personal information about you but only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your personal income tax returns and may also provide various tax and financial planning services to you at your request.

Examples of sources from which we collect information include:

- Internet donations,
- letters or e-mails from you,
- tax return or financial planning organizers, and
- Event donations.

B. Parties to Whom We Disclose Information

As a general rule, we do not disclose any personal information about our donors, supporters, or corporate sponsors or former clients to anyone without asking permission first. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

- To comply with a validly issued and enforceable subpoena or summons.
- In the course of a review of our foundations practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.
- As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.

- To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside service bureau to process tax returns or engaging a records-retention agency to store prior year records.)

C. Confidentiality and Security of Nonpublic Personal Information

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to selected members of our board, or under the supervision from a board member as we work with other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our firm, applicable law, our Code of Professional Conduct, and nondisclosure agreements where appropriate. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.

D. Others

Other than as state above, we do not disclose nonpublic personal information, or any other information, to any outside party without specific client authorization. An example would be other professionals who are assisting the Trey Foote Foundation in carrying out a client engagement. In such a case, we would require the donors, supporters, or corporate sponsors approval for such a disclosure

Closing Comments

Thank you for putting your trust in the Trey Foote Foundation. Together we will fight hard to find a cure to cancer. We value your support and are committed to protecting your privacy. We hope you view Trey Foote Foundation as a trusted entity and we will work to continue earning your trust. Please call us if you have any questions or if we can be of further service.

Best regards,

James J Foote
President Trey Foote Foundation