



Privacy Policy

Your privacy is important to us and we are committed to safeguarding your confidential information.

In providing services to you, we collect certain nonpublic personal information about you from various sources, including:

- Interviews regarding your tax situation.
- Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, date of birth, number of dependents, income, and other tax-related data.
- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099-R, 1099-INT and 1099-DIV, and stock transactions.

Pursuant to a Data Security Plan, we maintain physical, electronic, and procedural safeguards to protect your personal information. We restrict access to that information and disclose only the minimum necessary to those third parties that are essential in administering our operations. Aside from that, we do not disclose any nonpublic personal information about our clients or former clients, except as requested by our clients or as required by law.

Special Disclosure

Larry McClanahan is the sole owner and operator of both McClanahan Tax & Advisory LLC and SecondHalf Planning & Investment LLC. For efficiency purposes, the two separate businesses share certain equipment, software, and backup/archival processes. As such, this may constitute a *technical* sharing of your information between the businesses, but your information will not be used to offer services through SecondHalf Planning & Investment without your authorization.

If you have any questions about our Privacy Policy, please contact us at larry@mcclanahantax.com or 503 343 9860.