

Privacy Policy

Synergy Tax & Accounting Services LLC / Synergy Financial Edge

Effective Date: February 26, 2026

1. Introduction

Synergy Tax & Accounting Services LLC, doing business as Synergy Financial Edge, is committed to protecting your privacy. This Privacy Policy explains how we collect, use, disclose, and safeguard your information when you visit our website www.synergyfe.com, schedule appointments, or otherwise interact with us.

2. Information We Collect

We may collect the following types of information:

Personal Identification Information: Name, email address, phone number, business name, and other contact details you provide when booking an appointment or contacting us.

Appointment and Business Information: Details you share when scheduling a Synergy Session or engaging our services, including information about your business and financial needs.

Financial Information: Business financial data, tax information, and related records shared with us in the course of providing accounting, tax planning, or CFO advisory services.

Communications Data: Records of communications between you and us, including emails, SMS messages, and interactions through our communication tools.

Usage Data: Information about how you access and use our website, including IP address, browser type, pages visited, and time spent on pages.

3. How We Use Your Information

We use the information we collect to:

- Schedule and manage appointments and consultations
- Communicate with you about your account, services, and appointments
- Send transactional SMS messages including appointment reminders, service notifications, and follow-ups
- Provide accounting, tax planning, and CFO advisory services
- Improve our website and services

- Comply with legal and regulatory obligations including tax and financial reporting requirements

4. SMS Messaging

By providing your phone number and consenting through our booking form, you agree to receive transactional SMS messages from Synergy Tax & Accounting Services LLC. These messages may include:

- Appointment reminders and confirmations
- Service-related notifications and updates
- Follow-up communications related to your account
- Automated missed-call text-back responses

Message frequency may vary. Message and data rates may apply. Reply STOP at any time to opt out of SMS messages. Reply HELP for assistance.

SMS consent and phone numbers collected for SMS purposes are never shared with third parties or used for marketing by outside companies.

5. Artificial Intelligence and Automated Communications

We may utilize artificial intelligence (AI) tools and automated systems to assist with certain aspects of our business operations and communications. This may include, but is not limited to, scheduling assistance, automated responses, and internal document organization.

Any financial advice, tax guidance, or CFO recommendations provided to you are delivered by licensed human professionals. We do not use AI systems to make automated decisions that materially affect your rights or financial standing without human review.

If you have questions about whether you are interacting with a human or an automated system, you may contact us directly at tiffany@synergyfe.com.

6. Third-Party Tools and Service Providers

We use trusted third-party platforms to operate our business. These platforms may process your personal information as part of delivering our services. Each provider we utilize maintains their own privacy policy and data security practices, and we select providers who meet appropriate standards for data protection. SMS consent and phone numbers are never shared with third parties for their own marketing purposes. If you have questions about any specific platforms we use, please contact us directly.

7. Financial Data and Professional Obligations

As a licensed CPA firm, we are subject to professional confidentiality obligations under Arizona state law and applicable federal regulations. Financial and tax information you share with us is:

- Held in strict professional confidence
- Used solely for the purpose of providing the services you have engaged us for
- Never sold or disclosed to third parties except as required by law or with your explicit consent
- Retained in accordance with IRS recordkeeping requirements and applicable state regulations

8. Sharing of Information

We do not sell, trade, or rent your personal information to third parties. We may share information only in the following circumstances:

- With trusted service providers who assist in operating our business, who are bound by confidentiality agreements
- When required by law, regulation, IRS requirement, or legal process
- To protect the rights, property, or safety of our business, clients, or the public
- With your explicit written consent

9. Data Security

We implement appropriate technical and organizational security measures to protect your personal and financial information against unauthorized access, alteration, disclosure, or destruction. However, no method of transmission over the internet or electronic storage is 100% secure.

10. Your Rights

You have the right to:

- Access the personal information we hold about you
- Request correction of inaccurate information
- Request deletion of your personal information, subject to legal and professional obligations
- Opt out of SMS communications at any time by replying STOP
- Opt out of other marketing communications at any time

11. Cookies and Tracking

Our website may use cookies and similar tracking technologies to enhance your browsing experience and analyze website traffic. You may disable cookies through your browser settings, though this may affect certain functionality of our website.

12. Children

Our website and services are not directed to children under 13 years of age. We do not knowingly collect personal information from children under 13.

13. Third-Party Links

Our website may contain links to third-party websites. We are not responsible for the privacy practices or content of those sites and encourage you to review their privacy policies.

14. Changes to This Privacy Policy

We reserve the right to update this Privacy Policy at any time to reflect changes in our business practices, technology, or applicable law. We will notify you of significant changes by updating the effective date at the top of this policy. Continued use of our services after changes constitutes acceptance of the updated policy.

15. Contact Us

If you have any questions about this Privacy Policy, please contact us:

Synergy Tax & Accounting Services LLC / Synergy Financial Edge

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