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Privacy Notice

We understand your privacy is important and we are committed to safeguard that information. We are, or may be, required to disclose to you, our clients, our policies and practices regarding disclosure of non-public personal information. The following is our Non-Disclosure statement as required by the Federal Trade Commission, Privacy of Consumer Financial Information, I6 CFR PART 313 as required by 504(a) GLB ACT.

Information We Collect:

Our firm collects "non-public personal information" about you from the following sources:

- Information we receive from you on applications, documents used in preparing tax returns, etc.
- Information about your transactions with us or others; and
- Information we receive from third parties, such as insurance companies.

"Non-public personal information" is non-public information about you that we obtain in connection with providing financial products or services, including accounting or tax preparation services, to you.

Information We Disclose:

1. We do not disclose any non-public personal information about you to anyone, except as permitted by law.
2. We will adhere to the privacy policies and practices as described in this notice even if you become an inactive client.

Our Security Procedures:

We restrict access to your personal and account information to those employees who need to know that information to provide legal and financial services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information. We accomplish this through:

1. We restrict access to only those employees, agents, representatives or third parties who need to know the information to provide services/products to our clients.
2. Our employees, agents and representatives acting on our behalf have been trained to understand our security procedures, and they have agreed to honor our policies on client privacy.
3. We will continue to periodically review and update our security procedures, and to communicate any changes to our employees, agents and representatives.
4. We maintain strict password-protected access to all information located on our computer system. All sensitive documents are placed in our safe or in fireproof cabinets for the safety of those documents.

