



## Electronic Services Acknowledgement & Release Form

This acknowledgement describes York & Hopp, LLC (“YH”)’s policies on confidentiality and the collection, upload, transfer and processing of data through our website and operations. Your privacy is important to us and we will do our best to protect the security, integrity and confidentiality of your data—please read this document carefully, as it contains important information regarding your obligations and rights.

### Privacy Policy & Practices

The firm may from time to time, and depending on the circumstances, use third-party service providers to assist in preparing your return, but these preparers will not make substantive decisions concerning your return. We may share your information with these service providers, but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, the firm will remain responsible for the work provided by any such third-party service providers.

In the interest of facilitating our services to your company, we may send data over the Internet, store electronic data via computer software applications hosted remotely on the Internet, or allow access to data through third-party vendors’ secured portals or clouds. Electronic data that is confidential to you or your company may be transmitted or stored using these methods. We may use third-party service providers to store or transmit this data, such as providers of tax return preparation software. In using these data communication and storage methods, our firm employs measures designed to maintain data security. We use reasonable efforts to keep such communications and data access secure in accordance with our obligations under applicable laws and professional standards. We also require all of our third-party vendors to do the same.

You recognize and accept that we have no control over the unauthorized interception or breach of any communications or data once it has been sent or has been subject to unauthorized access, notwithstanding all reasonable security measures employed by us or our third-party vendors. You consent to our use of these electronic devices and applications and submission of confidential client information to third-party service providers during this engagement.

### York & Hopp CPAs’ Client Portal

To enhance our services to you, we will use ShareFile, a collaborative, virtual workspace in a protected, online environment. ShareFile allows for real-time collaboration across geographic boundaries and time zones and allows YH and you to share data, engagement information, knowledge, and deliverables in a protected

environment. In order to use ShareFile, you will be required to execute this client portal agreement and agree to be bound by the terms, conditions and limitations of such agreement.

- You agree that YH has no responsibility for the activities of ShareFile and agree to indemnify and hold YH harmless with respect to any and all claims arising from or related to the operation of ShareFile. While ShareFile backs up your files to a third party server, we recommend that you also maintain your own backup files of these records.
- You are solely responsible for the data, messages, notes, text, email address(es) and other information, confidential or otherwise, that you upload on or through the Site (collectively, the "User Data") or any other means. You are solely responsible at your sole cost and expense for creating personal backup copies of all User Data you post or store on the Site or provide to YH. When you post User Data to the Site, you authorize and direct YH to make such copies thereof as deemed necessary at YH's sole discretion in order to facilitate the use and storage of the User Data on the Site and by YH in performing tax, audit or other services.
- By posting User Data to the Site or accessing the Site, you represent that you have the authority and ability to post or access such information for YH's use and storage. YH does not assert any ownership over your User Data; rather, as between YH and you, subject to the rights granted to us in this document, you retain full ownership of all of your User Data and any intellectual property rights or other proprietary rights associated with your User Data.

YH will establish user accounts for the users that you wish to allow access the Site. In order to maintain security, you must inform YH of one or two individuals (the "Client Contact") who will be the authorized person(s) to contact YH in the event user access is to be granted or revoked from certain users. Initial user account passwords will be provided to you by YH following the request from the Client Contact to establish a new login account for a user. You shall have the Client Contact notify their YH representative immediately when any user account(s) are to be terminated. YH will reasonably endeavor to promptly terminate access to such user account(s). However, you cannot be assured that such access has been terminated until you receive confirmation of termination from YH. All user accounts will be terminated when the YH Client relationship is terminated.

**OPT IN:** I understand the above policies and agree to use of YH's client portal.

Agreed and accepted by: \_\_\_\_\_ Date: \_\_\_\_\_

Title (if business): \_\_\_\_\_ On Behalf of (if business): \_\_\_\_\_

OR

**OPT OUT:** I understand the above policies and opt out of use of YH's client portal.

Agreed and accepted by: \_\_\_\_\_ Date: \_\_\_\_\_

Title (if business): \_\_\_\_\_ On Behalf of (if business): \_\_\_\_\_



**Electronic Services Information Form**

Client Contact Name: \_\_\_\_\_

Client Contact Email: \_\_\_\_\_

Client Contact Phone Number: \_\_\_\_\_

	<b>User 1</b>	<b>User 2</b>	<b>User 3</b>
Name			
Email			
Phone Number			