

Privacy Policy

Effective Date: January 1, 2026

Metzler Bookkeeping Services, LLC ("we," "us," or "our") is committed to protecting your privacy and safeguarding your personal and financial information. This Privacy Policy explains how we collect, use, disclose, and protect your information when you use our website (www.metzlerbookkeeping.com) or receive SMS text messages (no more than 4 message per month), engage our bookkeeping services, or otherwise interact with us.

We provide bookkeeping and related financial services primarily to businesses across the United States using cloud-based tools like QuickBooks Online. As a financial services provider, we comply with applicable laws, including the Gramm-Leach-Bliley Act (GLBA), which requires us to inform you of our privacy practices and safeguard your nonpublic personal information (NPI).

If you have questions about this Policy, please contact us at the details provided at the end.

1. Information We Collect

We collect two main types of information:

A. Information You Provide Directly

- Contact details (name, email, phone, address)
- Business information (company name, revenue, industry, tax ID)
- Financial data necessary for services (bank statements, transaction records, receipts, payroll info, tax documents)
- Login credentials for integrated tools (e.g., QuickBooks Online access, shared securely)

B. Information Collected Automatically

- Website usage data (IP address, browser type, pages visited, time spent) via cookies and analytics tools (e.g., Google Analytics)
- Device information and log data for security and improvement purposes

We collect sensitive financial NPI only as required to perform agreed-upon bookkeeping services.

2. How We Use Your Information

We use your information to:

- Provide, maintain, and improve our bookkeeping services (e.g., reconciling accounts, preparing reports, tax optimization)
- Communicate with you (updates, reports, invoices)
- Comply with legal obligations (e.g., tax reporting, audits)
- Detect and prevent fraud or errors
- Analyze website performance and enhance user experience

We do not sell your personal information or share it for marketing purposes.

3. How We Share Your Information

We share information only as necessary and under strict confidentiality:

- **With Service Providers:** Secure third parties (e.g., QuickBooks/Intuit, cloud storage providers, payment processors) who assist in delivering services and are contractually bound to protect your data.
- **For Legal Reasons:** To comply with laws, subpoenas, or government requests; to enforce our rights; or to protect security.
- **Business Transfers:** In the event of a merger, acquisition, or sale of assets, your information may be transferred with notice.
- **With Your Consent:** For any other purpose with your explicit approval.

We do not share NPI with nonaffiliated third parties except as permitted under GLBA exceptions (e.g., processing transactions or with your consent).

4. Data Security

We implement reasonable administrative, technical, and physical safeguards to protect your information, including:

- Encryption for data in transit and at rest
- Secure cloud platforms (e.g., QuickBooks Online's robust security)
- Access controls and employee training
- Regular risk assessments

No method is 100% secure, but we strive to meet or exceed industry standards.

5. Your Rights and Choices

- **Access/Correction:** Request access to or correction of your information.
- **Opt-Out:** If we ever share for joint marketing (currently we do not), you may opt out.
- **Cookies:** Manage preferences via your browser settings.
- **California Residents:** Additional rights under CCPA/CPRA (e.g., deletion, no-sale).
We do not sell personal information.

Contact us for requests; we respond promptly.

6. Data Retention

We retain information as long as needed for services, legal compliance (e.g., 7 years for tax records), or dispute resolution. After that, we securely delete or anonymize it.

7. Children's Privacy

Our services are not directed to individuals under 18. We do not knowingly collect information from children.

8. International Transfers

We operate in the U.S.; data is primarily stored here. If transferred internationally, we ensure adequate protections.

9. Changes to This Policy

We may update this Policy. Significant changes will be notified via email or website notice. Continued use of services constitutes acceptance.

10. Contact Us

For questions, requests, or concerns:

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Thank you for trusting us with your financial information. Your privacy and security are our top priorities.