

Refund Policy

Leaf & Cole, LLP provides services which on an individual basis are paid for at completion of said service. In some cases, a retainer or service deposit are required before services are performed.

In the event a client requests a refund for a retainer, service deposit or inaccurate charges, the request must be made in writing to the address listed below. After receipt of the request for refund, the client's original payment method will be refunded after the issues are researched.

Leaf & Cole, LLP reserves the right to modify this Refund Policy at its discretion, or against any client it believes is abusing this policy. Any such revision or change will be binding and effective immediately after posting of the revised Refund Policy on Leaf & Cole, LLP website. It is the client's obligation to review our refund policy for any such revisions.

Privacy Policy

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Client's Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.