



Tax-Aid Questionnaire 客戶信息表

Site Manager Use only:
Efile or Paper?

Instructions: Complete pages 1-12 and return to Tax-Aid

说明指南：請填寫 1-12 頁並返還給 Tax-Aid

Tax-Aid Volunteer Screener Name:

Client #:

Tax-Aid Volunteer Station #:

Part 1 - Your Information/你的信息

Please Check Your Answers To Yes/No Questions 您的信息 (請對以下的問題圈出 "是" 或 "否")

- Did Tax-Aid prepare your tax return last year, for **2019**?/
Tax-Aid 有幫助你準備去年的報稅嗎? (2019 年) Yes/是 No/否
- Have you already filed a tax return this year 2020?/ 您今年是否已完成報稅 2020? Yes/是 No/否
- Have you or your spouse received any letters from the IRS?/您或您的配偶有沒有收到稅務局的信件? Yes/是 No/否

- Taxpayer's name/ 您的名字

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| First / 您的名字 | Middle / 中間名字縮寫 | Last / 姓氏 |
- Spouse's name/ 配偶的名字

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| First / 您的名字 | Middle / 中間名字縮寫 | Last / 姓氏 |

| Personal Information | Taxpayer/納稅人 | Spouse/伴侶 |
|--|--|--|
| Social Security Number/社会安全號碼 | <input type="text"/> | <input type="text"/> |
| If you have an Individual Taxpayer Identification Number(ITIN),please fill it in/你有 ITIN 號嗎? | <input type="text"/> | <input type="text"/> |
| Mobile Phone Number /納稅人的手機號碼 | <input type="text"/> | <input type="text"/> |
| Text Reminder okay/可用短信提醒嗎? | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| Birth Date/ 您的出生日期 | <input type="text"/> | <input type="text"/> |
| Are you a U.S. citizen? / 您是否為美國公民? | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| Are you a full-time student? / 您是否為全職學生? | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| Are you claimed as a dependent on another person's tax return such as your parent? 您是否在其他報稅表上被列為親屬列入您父母的表? | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |

Client: Go to next page
客戶：簽署一份近似頁



| Personal Information | Taxpayer/納稅人 | Spouse/伴侶 |
|---|--|--|
| Are you legally blind? / 你是否法定失明? | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| Last year were you permanently disabled? / 去年起, 您是否為永久殘障? | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| Home Phone / 您的家庭电话号码 | <input type="text"/> | <input type="text"/> |
| Employer/僱主, Job Title/您的職位, What is your job / 你的職業是什麼? | <input type="text"/> | <input type="text"/> |
| Email Address / 您的電子郵件地址 | <input type="text"/> | <input type="text"/> |
| Taxpayer's Mailing Address / 郵寄地址 | <input type="text"/> | |
| City, State, Zip Code, Apt./Unit/ 城市, 州名, 郵區編碼# | <input type="text"/> | |

Part 2 - How Are You Filing? / 您用何種身份報稅?

- Single (including registered domestic partnerships, civil unions, or other formal relationships under state law)
單身 (包括已註冊的伴侶關係或州法承認的其他正式關係)
- Married filing separately 已婚, 但分開報稅
- Date of final decree or separate maintenance agreement 最終離婚判決書日期, 或分居扶養協議日期
- Married filing jointly 已婚, 共同報稅
- Was your marriage recognized under state law for the state(s) you are filing in? 您的婚姻是否被您所報稅的州承認? Yes/是 No/否
- Did you get married in **2020**? 請問您是否於 **2020**年結婚? Yes/是 No/否
- Head of Household 單身, 但有撫養其他人
- Did your spouse live with you during any part of the last six months of the tax year? 在過去6個月, 您的配偶曾否與您同住? Yes/是 No/否
- Qualifying Widow(er) With Dependent Child 喪偶少於兩年, 但有扶養其他人
- Year of spouse's death 配偶死亡年份



If you/your spouse were a victim(s) of identity theft and received a e-filing PIN from the IRS, what is the PIN?/ 如果您/您的配偶是身份盜竊的受害者，并从国税局获得了电子申请 PIN 码，那么 PIN 码是什么？

| E-Filing PIN/電子申請 PIN | You 您 | Your spouse 配偶 |
|-----------------------|----------------------|----------------------|
| IP PIN # 身份保護 PIN 碼 | <input type="text"/> | <input type="text"/> |
| Type of ID: 身份證明種類 | <input type="text"/> | <input type="text"/> |
| ID #: 身份證明號碼 | <input type="text"/> | <input type="text"/> |
| State ID issued 頒發州 | <input type="text"/> | <input type="text"/> |
| Issue date 頒發日期 | <input type="text"/> | <input type="text"/> |
| Expiration date 失效日期 | <input type="text"/> | <input type="text"/> |

If you want Direct Deposit for a tax refund, list your banking information. / 如有退稅,是否想直接轉帳?

Apply refund to any balance due? 用退稅款應付餘額欠款? Yes/是 No/否

Bank name/ 銀行名稱:

Routing number/ 匯款路線號碼:

Account number/ 銀行帳號:

Type of Account: Checking / Savings 帳戶類型: 活期/儲蓄

Part 3 - Dependents / 您的被撫養人

Have you or your spouse adopted a child?/ 您或您的配偶是否曾經領養過小孩? Yes/是 No/否

| Dependent's Full Name / 被撫養人的名字 (First/ 名, Middle Initial/中間名縮寫, Last/姓氏) | Date of Birth MMDDYY 出生日期 | Social Security Number or ITIN 社会安全号码 | # Months Lived with Taxpayer 有几个月与您一起住 | Full-time Student? 是否為全職學生? | Relation (son, daughter, etc.) 與您的關係 (儿子, 女儿, etc.) | Totally and Permanently Disabled? 是否為永久殘障? |
|---|---------------------------|---------------------------------------|--|---|---|---|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 | <input type="text"/> | <input type="radio"/> Yes/是 <input type="radio"/> No/否 |

Client: Go to next page
客户: 签署一份近似页



Part 4 - Last year, did you, your spouse, or all your dependents / 您或您的配偶去年是否收到

1. Did you, your spouse, and all of your dependents have health insurance for the full year? 1. Yes/是 No/否
/ 您的配偶或您的扶養人是否有全年的醫療保險?
2. Receive one or more of these forms? 2. Yes/是 No/否
(Check the box) / 收到以下列表? (若有, 請勾選) 1095-B 表 1095-C 表
3. Have coverage through the Marketplace (Exchange)? / 是否經由 Marketplace 3. Yes/是 No/否
(交易所)投保?若是, 請提供 1095-A 表 3895 表格
- a. If yes, receive an advanced payment from the Marketplace to help pay your monthly a. Yes/是 No/否
health care payments? 若是, 是否每月從 Marketplace 收到一筆用以支付醫保費的預付款?
- b.If yes, is everyone listed on your Form 1095-A being claimed on this tax return?若 b. Yes/是 No/否
是,是否在您 1095-A 表上的每一個人皆在此份報稅表中?
4. Have an exemption granted by the Marketplace? /是否從 Marketplace 獲得豁免的資格? 4. Yes/是 No/否

Part 4A - Did You or Your Spouse Receive...? / 您或您的配偶是否收到...?

1. Wages / 工資 (W-2) 1. Yes/是 No/否
2. Tips/ 小費 2. Yes/是 No/否
3. Did you or your spouse receive the Economic Impact Payment (Stimulus)? / 3. Yes/是 No/否
你或你的伴侶有收到政府的疫情經濟協助金嗎?
4. Did you expect to receive additional Economic Impact Payment (Stimulus)? / 4. Yes/是 No/否
你是否應得額外的疫情經濟協助金? 是
5. Did you take family leave or sick leave due to Covid-19 / 5. Yes/是 No/否
你是否因為疫情向工作請了病假或者家庭假期
6. Scholarships / 獎學金 (1098-T) 6. Yes/是 No/否
7. Interest/dividends / 銀行利息 / 股票利息 (1099-INT, 1099-DIV) 7. Yes/是 No/否
8. State/local tax refund / 州退稅 (1099-G) 8. Yes/是 No/否
9. Alimony income or separate maintenance payments/ 贍養費 9. Yes/是 No/否
10. Self-employment income / 現金或自雇收入 (1099-MISC, Cash) 10. Yes/是 No/否
11. Income for work not reported on Forms 工作收入沒有申報在 W-2/1099 11. Yes/是 No/否
12. Transactions of stocks/bonds /real estate/買賣股票/債券/房地產 (1099-S, 1099-B) 12. Yes/是 No/否



13. Disability income (insurance/workers comp)/ 殘障收入保險賠款/職業傷害賠償) 13. Yes/是 No/否
14. Pension, annuity, IRA distributions /養老金/退休金/年金/個人退休帳戶提款(1099-R) 14. Yes/是 No/否
15. Did you make withdrawals from your IRA or other retirement account due to Covid-19? /
你是否因為疫情從養老基金取出資金 15. Yes/是 No/否
16. Unemployment compensation / 失業救濟金 (Form 1099-G) 16. Yes/是 No/否
17. Social Security, Railroad/ 社會安全福利金/鐵路退休員工福利金 (SSA-1099, RRB-1099) 17. Yes/是 No/否
18. Income (or loss) from rental property / 物業出租盈利或虧損 18. Yes/是 No/否
19. Other income (gambling/lottery, prizes/awards, jury duty, Schedule K-1, etc.)/
其他收入(博彩/彩票, 獎品獎項, 陪審團職責, 時間表 K-1 等) 19. Yes/是 No/否
20. Have you purchased and/or sold any cryptocurrency (example bitcoin) /
您是否在 2020 年有購買或拋售任何加密貨幣 (例如比特幣)? 20. Yes/是 No/否
21. Have you received any cryptocurrency (example bitcoin) in exchange for performing
any services/ 您是否在 2020 年收到任何加密貨幣 (例如比特幣) 以換取任何服務? 21. Yes/是 No/否

Part 4B - Did You or Your Spouse Pay...? / 您或您的配偶是否支付...

1. Rent / 租金 1. Yes/是 No/否
2. Was your home rental considered subsidized housing/
你所租住的住處是否被定為政府協助類的房屋? 2. Yes/是 No/否
3. Alimony or separate maintenance payments/ 贍養費 3. Yes/是 No/否
4. Contributions to a retirement account/ 退休戶口供款 4. Yes/是 No/否
5. Post secondary education expenses / 高等學院學費 (1098-T) 5. Yes/是 No/否
6. Medical expenses / 自付醫療費用 6. Yes/是 No/否
7. Home mortgage interest / 房屋貸款利息 (1098) 7. Yes/是 No/否
8. Student loan interest / 學生貸款利息 (Form 1098-E) 8. Yes/是 No/否
9. Real estate taxes or personal property taxes / 物業稅 / 個人資產稅 (1098) 9. Yes/是 No/否



10. Charitable contributions / 慈善捐贈 10. Yes/是 No/否
- a) Amount of contribution \$ 你說租住的住處是否被定為政府協助類的房屋? 如果是, 金額是多少?
- b) How was this contribution made Cash/Check /Credit Card /你所付的資金形式是什麼? 現金, 信用卡, 或支票?
11. Child or dependent care expenses such as daycare / 日間托兒費 11. Yes/是 No/否
12. For supplies as an educator (i.e., teacher, teacher's aide, counselor, etc.) 12. Yes/是 No/否
/ 教師的教育用品支出
13. Expenses related to self-employment income or any other income you received 13. Yes/是 No/否
/ 与自雇收入 / 其他收入相关的支出
14. Estimated tax payments for **2020** / 联邦预缴税 14. Yes/是 No/否

Part 4C - Did you have... 您是否有

1. Health Savings Account / 保健储蓄账户(5498-SA, 1099-SA), W2 with Code W in box 12 1. Yes/是 No/否
2. Have debt cancelled/forgiven/債務取消/赦免 (1099-C, 1099-A) Credit card/mortgage 2. Yes/是 No/否
信用卡或抵押貸款
3. Buy, sell, foreclose (COD) your home / 買 / 賣 / 法拍 你的物業 (Form 1099-A) 3. Yes/是 No/否
4. Have Earned Income Credit (EIC) disallowed a prior year / 您的低收入家庭福利優惠 (EITC) 曾否被禁止 4. Yes/是 No/否
5. Purchase/install energy-efficient home items (such as windows, etc.) / 您有否購買/ 安 5. Yes/是 No/否
裝高效節能家用物品 (如窗戶等)
6. Live in an area that was affected by a natural disaster / 您是否生活在受自然災害的地 6. Yes/是 No/否
區. If yes where? 如是, 則哪裡?
7. Estimated tax payments for 2020/ 联邦预缴税 2020 7. Yes/是 No/否
8. A "capital loss carryover" (on Form 1040 Schedule D) /A74 您是否有“資本損失結轉” 8. Yes/是 No/否
(F1040 附表 D)
9. Apply last year's refund to this year's taxes / 將去年的退稅用於支付今年的稅款 9. Yes/是 No/否



Tax-Aid depends on grants and contributions to operate our free tax sites. The data from the following optional questions may be used to apply for these grants and for statistical purposes. Tax-Aid 透過補助金和捐款來經營我們免費的稅收據點。以下選項將會被用於申請補助金和做為統計目的。

1. Ethnicity 種族 check all that apply/請選擇所有適用選項:

- African American/Black:非裔
美國人/黑人
- Latinx 拉丁裔
- Other: 其他_____
- Asian 亞洲人
- Native American 美國原住民
- Prefer not to answer: 不方便
回應
- Caucasian/White 白人
- Native Hawaiian/ Pacific
Islander 夏威夷原住民

2. What is your gender? (Check one that that best describes your current gender identity 您的性別是?
(請選擇最能描述您當前性別身份的選項)

- Female 女人
- Gender Non-binary 非二元性
別
- Transgender 變性人
- Male 男人
- Transgender Female 跨性別
女性
- Other 其他_____
- Gender queer 性別酷兒
- Transgender Male 跨性別男
性
- Prefer not to answer 不方便
回應

3. Do you or any member of your household have a disability? 您或您的任何家庭成員有殘疾嗎?

- Yes 是
- No 不是
- Prefer not to answer: 不方便回應

4. Are you or your spouse a Veteran from the U.S. Armed Forces? 您或您的配偶是美國的退伍軍人嗎?

- Yes 是
- No 不是
- Prefer not to answer: 不方便回應



INCOME SUMMARY

| | Taxable Income | | Non-Taxable Income |
|--------------------|----------------------|-----------|----------------------|
| Wages (W-2/1099) | <input type="text"/> | SSA/SSI | <input type="text"/> |
| Interest/Dividends | <input type="text"/> | AFDC | <input type="text"/> |
| Schedule C | <input type="text"/> | Gen. Asst | <input type="text"/> |
| IRA/401(k)/Pension | <input type="text"/> | Other | <input type="text"/> |
| Other | <input type="text"/> | | |
| TOTAL INCOME | <input type="text"/> | | |

Is the taxpayer below our **\$57,000** gross income (taxable) requirement?
Does the taxpayer NEED to file a return?

Yes/是 No/否
 Yes/是 No/否

| | |
|-------------------------|----------------------|
| Withholding | <input type="text"/> |
| Estimated Tax Payments | <input type="text"/> |
| Direct Deposit Verified | <input type="text"/> |
| EFile? | <input type="text"/> |
| ERO PIN? Yes / No | <input type="text"/> |

| | |
|-------------------------------|----------------------|
| Earned Income Credit | <input type="text"/> |
| Renter's Credit | <input type="text"/> |
| Client Renumbered? | <input type="text"/> |
| Critical Diagnostics cleared? | <input type="text"/> |





Taxpayer Agreement to Disclose

We **will not** share or use personal identifying information including your social security number, ITIN, date of birth, refunds or personal financial information. We will only use your contact information to inform you of other services that may benefit you. We will use and keep your data combined with THOUSANDS of other taxpayers for the duration of the free tax preparation program to share results like this:

Tax-Aid **2020** Results
3,096 tax returns
\$2,186,013 million in total refunds

The following persons, groups or organizations receive the combined data results:

- Free tax preparation program donors and volunteers
- Various media partners
- Elected officials and other program supporters
- General public

Consent to Disclose

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Yes, I agree to share my tax return information with the above persons, groups or organizations

No, I do not agree to share my tax return information with the above persons, groups or organizations

Name(s)
Signature

Date
Spouse's Signature

Client: Go to next page
客户：签署一份近似页 



披露信息協議

絕不會泄露或使用您的個人身份信息，包括社會安全號碼，ITIN（納稅者身份號），出生日期，報稅信息 或其他個人財務信息。我們將只使用您的聯絡信息，用于通知您其他可能使您受益服務。您的信息將與數千名從我們這裡得到服務的報稅人的信息匯總在一起，匯總信息將以如下形式出現在各種可能的共享場合：

Tax-Aid 2020 Results
3,096 tax returns
\$2,186,013 million in total refunds

以下人士、團體或組織可能獲得匯總數據：

- 免費稅務籌劃方案的捐助者和志願者
- 若干媒體合作夥伴
- 民選官員和其他組織的支持者
- 一般民眾

披露信息授權

按聯邦法律的規定，我們應向您提供此授權表格。除非得到法律的授權，未經您的同意，我們不能將您的報稅信息向與報稅無關的第三方披露。如果您授權披露您的報稅信息，聯邦法律將不再保護您的報稅信息免于被進一步使用或擴散。您並不是必須填寫此表格。如果您的簽字授權是有條件的，那麼授權將被視為無效。您可以指定授權的有效期，如果您不指定時間，那麼有效期將被默認為一年。如果您認為，在未經法律授權也未經您授權的情況下，您的報稅信息被泄露或被不正當地使用了，您可以考慮通過電話或電子郵件聯繫財政部稅務總局監察長（TIGTA），電話：1866-366-4484，電子郵件：complaints@tigta.treas.gov。

是的，我同意我的報稅信息與上述人士、團體或組織共享

不，我不同意我的報稅信息與上述人士、團體或組織共享 organizations

姓名

日期

簽名

配偶簽名

注：此文件為翻譯件，若出現歧義，請以原文為準。





**TAX-AID
CLIENT PRIVACY NOTICE**

| | |
|--------------|--|
| FACTS | WHAT DOES TAX-AID DO WITH YOUR PERSONAL INFORMATION? |
| WHY? | U.S. federal law provides clients with the right to limit some but not all of a company's decisions with respect to the sharing of the client's personal information. U.S. federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do. |
| WHAT? | <p>We collect nonpublic personal information about you that is either provided by you or obtained by us with your authorization. The types of personal information we collect and share depend on the particular service that we provide to you. This information can include your:</p> <ul style="list-style-type: none"> name; Social Security number; Individual Taxpayer Identification Number; address; date of birth; bank account information; employment details; earnings and expenses; family members' names, dates of birth, Social Security numbers and earnings (if any); and contact information (phone number and email address). |
| HOW? | Accounting service companies need to share their clients' personal information to run their everyday business. In the section below, we list the reasons accounting service companies can share their clients' personal information, the reasons Tax-Aid chooses to share some of this information and whether you can limit this sharing. Once you are no longer our client, we can continue to share your information as described in this notice. |

| Reasons we can share your personal information | Does Tax-Aid share? | Can you limit this sharing? |
|---|---------------------|-----------------------------|
| For our everyday business purposes—such as to process your tax filings, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes | No |
| For our marketing purposes—to offer our services to you | No | We don't share |
| For joint marketing with other companies | No | We don't share |
| For Nonaffiliates (defined below) to market to you | No | We don't share |

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| | Call us at 415-229-9240 or email us at admin@tax-aid.org |
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| Who we are? | |
|--|---|
| Who is providing this notice? | Tax-Aid |
| What we do? | |
| How does Tax-Aid protect my personal information? | To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include physical, electronic and procedural safeguards. |
| How does Tax-Aid collect my personal information? | We collect your personal information, for example, when you <ul style="list-style-type: none">• submit your tax documents to us;• contact us with questions; and• work with one of our tax professionals to prepare your taxes. |
| Why can't I limit all sharing? | U.S. federal law gives you the right to limit only our sharing to Nonaffiliates to market to you. State laws and individual companies may give you additional rights to limit sharing. |

| Definitions | |
|------------------------|---|
| Nonaffiliates | Companies not related by common ownership or control. Such companies can be financial and nonfinancial companies. |
| Joint marketing | A formal agreement between nonaffiliated companies that together market products or services to you. Tax-Aid does not jointly market. |

| Other important information | |
|------------------------------------|--|
| N/A | |





TAX-AID

客戶隱私政策聲明

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|------|---|
| 類別 | TAX-AID 會如何使用你的個人信息？ |
| 用途 | 美國聯邦法律提供消費者一些(但不是全部)權益來限制個人信息分享相關的機構決策。美國聯邦法律同時規定我們告知個人信息的收集, 分享方式以及保護措施。請咨詢閱讀此聲明來更好地瞭解我們的政策。 |
| 信息範圍 | 我們收集的非公開信息都會是您個人提供的或者經您許可之後所收集。我們所收集並分享的信息類別將會根據您所需要的具體服務。這些信息包括: 姓名; 社會安全號碼; 個人報稅識別號碼; 住址; 出生日期; 銀行賬戶號碼; 就業單位信息; 收入與開銷; 家庭成員的姓名, 出生日期, 社會安全號碼與收入。 聯繫方式 (電話號碼與郵件地址) |
| 方式 | 會計類服務公司的日常業務需要顧客個人信息。此下我們會詳細解作爲會計公司, 我們機構分享個人信息的原因, 以及您是否可以限制此類信息分享。如果您不再是我們的顧客, 我們可以按照此聲明持續分享您的信息。 |

| 個人信息分享的用途 | 是否分享? | 可不可以限制? |
|---|-------|---------|
| 我們日常的業務用途— 例如, 報稅流程所需, 賬戶信息所需, 法令與其他法律調查所需, 或是給信用社的報告。 | 分享 | 不可以 |
| 給我們內部的營銷— 爲了給您提供我們的服務 | 不分享 | 不分享 |
| 給聯合營銷的其他公司 | 不分享 | 不分享 |
| 給非附屬公司(定義在下方)的營銷 | 不分享 | 不分享 |

您可以電話聯係 415-229-9240 或郵件 admin@tax-aid.org





| | |
|----------------------------|--|
| 1. 我們是誰 | |
| 聲明發佈機構 | Tax-Aid |
| 2. 信息用途 | |
| Tax-Aid 如何保護我的個人信息？ | 爲了保護您的個人信息並防止未經贖權的使用，我們使用符合聯邦法律規定的網絡與系統安全機制，包括實體，電子以及程序化措施。 |
| Tax-Aid 如何收集我的個人信息？ | 我們會在以下情況下收集你的個人信息： <ul style="list-style-type: none">• 提交報稅申請，文件；• 提交問題與其他交流；• 與我們的報稅人員合作。 |
| 為社麼我不可以限制所有信息共享？ | 美國聯邦法律只給予消費者權益限制機構與其他非附屬公司利用信息分享對消費者進行營銷，具體州法律與公司政策可能給您額外信息分享的限制權利。 |

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| 3. 定義 | |
| 非附屬公司 | 無共同所有權或掌控權的公司，無論金融公司與否。 |
| 聯合營銷 | 非附屬公司之間有關於營銷產品和服務的正式合作。Tax-Aid 不進行聯合營銷。 |

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| 其他重要信息 | |
| 無 | |

