

# Privacy Policy

**Effective Date:** December 31, 2024

Excellent Reporting LLC (“we,” “us,” “our”) is committed to protecting your privacy and handling your information with transparency and care. This Privacy Policy explains what information we collect, how we use it, and the choices you have regarding your data.

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## 1. Information We Collect

We may collect the following types of information:

### Information You Provide Directly

- Name, email address, phone number, business name
- Financial documents or data you voluntarily share for service delivery
- Messages or inquiries submitted through forms, email, or scheduling tools

### Automatically Collected Information

- IP address, browser type, device information
- Pages viewed, time spent, and general activity on the site
- Cookies and analytics data (e.g., Google Analytics)

### Information from Third Parties

If you connect systems (QuickBooks Online, Google Drive, etc.) for service purposes, we may access information you explicitly authorize.

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## 2. How We Use Your Information

We use your information to:

- Deliver bookkeeping, reporting, and consulting services

- Respond to inquiries and customer support requests
- Improve website performance and user experience
- Send updates, insights, or service-related communications
- Maintain security, compliance, and proper business operations

We do **not** sell or rent personal information to third parties.

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### 3. How We Share Information

We may share information only when necessary:

- With service providers assisting in operations (e.g., scheduling tools, analytics software)
- To comply with legal obligations or requests
- To protect the rights and security of users or our business

We do not share financial information or uploaded documents with third parties except as required to provide requested services.

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### 4. Data Security

We take reasonable administrative, technical, and physical safeguards to protect your information.

However, no method of transmission or storage is completely secure, and we cannot guarantee absolute protection.

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### 5. Your Choices & Rights

You may:

- Request access to your information

- Ask us to update or correct data
- Request that we delete information where legally permissible
- Opt out of communications at any time

To make any of these requests, email us at **[bookkeeping@excellentreporting.com](mailto:bookkeeping@excellentreporting.com)**

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## 6. Data Retention

We retain information only as long as necessary to provide services or meet legal, regulatory, and operational requirements.

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## 7. Third-Party Links

Our website may contain links to external sites. We are not responsible for the privacy practices or content of those websites.

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## 8. Updates to This Policy

We may update this Privacy Policy periodically. Any changes will be posted on this page with a revised effective date.

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## 9. Contact Us

If you have questions about this Privacy Policy or how your data is handled, contact:  
**[bookkeeping@excellentreporting.com](mailto:bookkeeping@excellentreporting.com)**