



Law Office of  
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## **PRIVACY POLICY OF JEFFREY R. VAN DYKE, P.C.**

To My Clients and Prospective Clients:

Your privacy is most important to me, and maintaining your trust and confidence is one of my highest priorities. I respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. I hope that by taking a few moments to read this Privacy Policy you will have a better understanding of what I will do with the information you provide me and how I keep it private and secure.

### **A. Types of Information I Collect**

I collect certain personal information about you—but only when that information is provided by you or is obtained by me with your authorization. I may use that information to prepare your personal estate planning documents and may also use it to provide various tax, business and financial planning related services to you at your request.

Examples of sources from which I collect information include:

- interviews and phone calls with you
- letters or e-mails from you
- tax returns or estate planning organizers and questionnaires
- previous estate planning items executed by you

### **B. Parties to Whom I Disclose Information**

As a general rule, I do not disclose personal information about my prospective clients, current clients or former clients to anyone. However, to the extent required by law and any applicable state Code of Professional Responsibility, certain nonpublic information about you may be disclosed in the following situations:

1. If necessary to properly respond to an inquiry or complaint from the Illinois Attorney Registration and Disciplinary Commission.

2. In conjunction with a prospective purchase, sale or merger of all or part of my practice. This would only occur provided that I take appropriate precautions (for example, through a written confidentiality agreement) so the prospective purchaser or merger partner does not disclose information in the course of the review.
3. As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against me, provided I disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.
4. To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for me in conjunction with my services to you, but only if I have an agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside accounting firm to process tax returns or engaging a records-retention agency to store records.)

**C. Confidentiality and Security of Nonpublic Personal Information**

Except as otherwise described in this notice, I restrict access to nonpublic personal information about you to employees of my firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of my firm, applicable law, our Code of Professional Responsibility, and nondisclosure agreements where appropriate. I also maintain physical, electronic and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.

Thank you for the opportunity to serve your legal needs. I value your business and am committed to protecting your privacy. I hope you view my firm as your most trusted advisor and I will work to continue earning your trust. Please call me if you have any questions or if I can be of further service.

Sincerely,

Jeffrey R. Van Dyke  
Jeffrey R. Van Dyke, P.C.