

## Privacy Policy & SMS Terms and Conditions

### Introduction

Capone & Associates ('we,' 'our,' or 'us') is committed to protecting your privacy and safeguarding the information you provide when visiting our website, engaging our services, or communicating with us.

We reserve the right to update this Privacy Policy at any time. Any changes will be posted on this page with an updated effective date.

### Information We Collect

When you visit our website or engage with our services, we may collect the following information:

- Name
- Email address
- Telephone number
- Company name
- Mailing address
- Information submitted through website forms
- Information provided during consultations and service engagements
- Website usage data, including IP address, browser type, and pages visited
- Cookie and analytics information

### How We Use Your Information

We collect and use your information to:

- Respond to inquiries and requests
- Provide accounting, advisory, bookkeeping, controller, and fractional CFO services
- Schedule and manage appointments and meetings
- Communicate regarding projects and client engagements
- Deliver account-related notifications
- Improve our website and customer experience
- Comply with legal and regulatory obligations

### Information Sharing

Capone & Associates does not sell, rent, or lease your personal information.

We may share information with trusted third-party service providers who assist us in operating our business, including:

- Website hosting providers
- Customer relationship management (CRM) platforms
- Communication and messaging providers
- Cloud storage and software vendors
- Professional advisors and consultants

These providers may access information only as necessary to perform services on our behalf and are obligated to maintain its confidentiality.

We may also disclose information when required by law or when necessary to protect our rights, clients, employees, or business operations.

SMS consent is not shared with third parties or affiliates for marketing purposes.

#### Data Security

Capone & Associates implements reasonable administrative, technical, and physical safeguards designed to protect personal information against unauthorized access, disclosure, alteration, or destruction.

#### Cookies and Analytics

Our website may use cookies and similar technologies to improve website functionality and analyze visitor activity. Cookies help us understand how visitors use our website so we can improve content, navigation, and user experience. You may disable cookies through your browser settings at any time.

#### Third-Party Websites

Our website may contain links to external websites. We are not responsible for the privacy practices or content of those websites. We encourage users to review the privacy policies of any third-party sites they visit.

#### Your Privacy Choices

You may request to:

- Access your personal information
- Correct inaccurate information
- Request deletion of information where permitted by law
- Opt out of certain communications

To make a request, please contact us using the information provided below.

## SMS Terms and Conditions

By providing your mobile phone number through our website, client onboarding process, appointment scheduling system, or other communication channels, you consent to receive SMS text messages from Capone & Associates

Types of Messages You May Receive:

- Appointment reminders
- Meeting scheduling and confirmations
- Client service updates
- Project status updates
- Account notifications
- Customer support communications
- General business communications

Message Frequency:

Messaging frequency may vary. The number of messages you receive will depend on your interactions with Capone & Associates and the services you receive.

Message and Data Rates:

Message and data rates may apply. Please consult your mobile carrier regarding applicable fees.

Opting Out:

You may opt out of SMS communications at any time by replying STOP. Once you opt out, you will no longer receive SMS messages unless you subsequently opt back in.

Assistance:

For assistance, reply HELP. You may also contact us through our website at <https://caponeandassociates.biz>.

Privacy of SMS Information:

Your mobile number and SMS consent information will be used solely for the purpose of providing requested communications.

SMS consent is not shared with third parties or affiliates for marketing purposes.

Contact Information

Capone & Associates  
717 Market Street  
Wilmington, NC 28401

Website: <https://caponeandassociates.biz>

If you have questions regarding this Privacy Policy or SMS communications, please contact us through our website.

#### Updates to This Policy

We may update this Privacy Policy and SMS Terms and Conditions from time to time. Any changes will be posted on this page with an upd