Prestige Wealth Group – Privacy Policy & Terms

Oct 23, 2026 · @Erica Dixon

Privacy Policy

Effective October 23, 2026. Prestige Wealth Group LLC ("Prestige Wealth Group," "we," "us") is a tax preparation business based in Riverdale, Georgia, established May 20, 2026. This policy explains what personal information we collect, how we use it, and how we protect it.

It applies to our website, online forms, email, phone calls, and text messages, including our free PTIN guide and our tax preparer team recruiting. It also applies to clients whose tax returns we prepare.

Information we collect

- **Contact information** you give us on forms, by phone, by text, or through social media messages: name, email address, and phone number.
- **Tax information** clients provide so we can prepare returns, such as income documents, Social Security numbers, dependent details, and bank details for refunds.
- **Team applicant information** from people interested in joining our preparer team, such as PTIN status and contact details.
- **Basic website data** such as browser type and pages visited, collected through cookies used by our website and form tools.

How we use it

- To send the free guide or other information you asked for
- To answer your questions and schedule calls
- To prepare and file tax returns for clients
- To onboard and support members of our preparer team
- To send text messages and emails you agreed to receive
- To meet our legal and IRS obligations

We do not sell your personal information.

Text messaging (SMS) privacy

We only text you if you gave us your number and checked a consent box, or otherwise agreed to receive texts.

No mobile information will be shared with third parties or affiliates for marketing or promotional purposes. Text messaging opt-in data and consent will not be shared with any third parties. We may share information with service providers that help us send messages, such as our CRM and phone carrier, only so they can deliver our texts.

You can opt out at any time by replying **STOP**. Reply **HELP** for help. Message and data rates may apply.

When we share information

We share information only when needed to serve you or follow the law:

- With the IRS and state tax agencies, to file your return
- With service providers we use to run our business, such as our tax software, CRM, email, and payment processor
- With members of our preparer team who work on your return, under our confidentiality rules
- When required by law, court order, or government request

We will not use or disclose your tax return information for any other purpose without your written consent, as required by federal law.

How we protect it

We follow a Written Information Security Plan based on IRS guidance. We use password-protected accounts, multi-factor authentication where available, secure document handling, and limited access to client files. We keep tax records only as long as needed for legal and business purposes, then dispose of them securely.

Your choices

- Reply STOP to any text to stop texts
- Click unsubscribe in any marketing email
- Contact us to ask what information we have about you, or to correct or delete it, unless we must keep it by law

Contact us

Prestige Wealth Group LLC, Riverdale, Georgia Email: ericaddixon1989@gmail.com Phone and text: (470) 672-9742

We may update this policy. The effective date above shows when it last changed.

Terms of Service

Effective October 23, 2026. By using our website or forms, or by signing up for our messages, you agree to these terms.

Our website and forms

Our content, guides, and webinars are for general education. They are not tax, legal, or financial advice for your specific situation. Results vary, and we do not guarantee any income, refund amount, or outcome.

Please give accurate information when you fill out our forms. Do not misuse our website or forms.

Text messaging terms

- **Program:** Prestige Wealth Group LLC sends texts about your free PTIN guide, scheduling calls, webinars, team updates, and, if you opted in, offers and promotions.
- **Frequency:** Message frequency varies.
- **Rates:** Message and data rates may apply.
- **Opt out:** Reply **STOP** at any time to cancel. You will get one confirmation text, then no more texts unless you sign up again.
- **Help:** Reply **HELP** for help, or contact us using the details below.
- **Carriers:** Carriers are not liable for delayed or undelivered messages.
- **Privacy:** See our Privacy Policy above. Your mobile information will not be shared with third parties or affiliates for marketing or promotional purposes.

Payments

Fees for team enrollment, products, and services are shown before you pay. Team enrollment fees are non-refundable, as stated in our Independent Contractor Agreement.

Limits of responsibility

We are not responsible for losses from your use of general information on our website or in our guides. Nothing here limits rights you have under law.

Governing law and changes

These terms are governed by the laws of the State of Georgia. We may update them, and the effective date above shows when they last changed.

Contact us

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