Head, Clara & Maria Policies and Procedures			
DEPARTMENT: Finance			**POLICY #: F-01**
POLICY NAME: Divulging Personal Information Via Phone			
DATE:	**REV. DATE:** April 2021	**APPROVED BY:**	**PAGE #:** 1 of 1

PURPOSE
To establish what information can be divulged to real estate agents, lawyers, property owners and others regarding tax information or any other information that might constitute an unjustified invasion of personal privacy considering provincial and federal laws concerning the protection and privacy of information.

GUIDELINES

1. Ratepayers may request personal tax information over the phone. Before any information is provided, it must be confirmed that they are listed as a title owner of the property and they must provide at least two identifiers for the property (i.e. roll number, civic address, legal description). If a mortgage company requests any information pertaining to a tax bill, they must provide a letter, original or faxed, signed by the ratepayer requesting the information required and authorizing the release of that information to the mortgage company.

2. Staff can advise that the roll book is a public document and is available for viewing and that our tax rates are posted on-line, however; the individual would need to come to the office to view the tax roll. It is not up to staff to locate the information or to provide the calculation.

3. Lawyers, or others, acting on behalf of the property owner making requests for the amount of taxes actually owing on any property will have to make a formal request for a tax certificate accompanied by the fee of $25.

4. Individuals other than lawyers will have to provide staff with written authorization to obtain personal information.