



# Taxoom's Privacy Policy

Taxoom, LLC (collectively "We," "Us," "Our," or "Taxoom") provides you with income tax return preparation services. These services include the collection, use, storage, and sharing of your personal data. The safeguarding of this data is very important to us. Except as described within this Privacy Policy, we will not share or sell nonpublic information about you. Furthermore, this Privacy Policy is designed to help you better understand how your data is being used, specifically:

- Types of Data Collected
- Sources of Data Collected
- Uses of Data Collected
- Sharing of Data Collected
- Securing Collected Data
- Data Retention
- Contact Us
- Privacy Policy Updates and Effective Date

## **Types of Data Collected**

To provide you with our services, we collect various types of information. In addition to information about yourself, this may also include information about your spouse, your dependents, or your business. The information we collect includes, but is not limited to:

<b>Identity</b>
Name, phone number, address, email address, social security number or other government identification number, date of birth, demographic information
<b>Financial</b>
Income and revenues, expenses, deductions, credits, assets, liabilities, bank account information, credit card information
<b>Information Technology</b>
Geo-location information, interactions with our websites, advertisements, or other applications, internet protocol (IP) address, device type, unique identifier, application version, operating system, network data, phone state, login information
<b>Other</b>
Health insurance status and financial information related to payment for health services, professional or employment-related information, educational information



### **Source of Data Collected**

Most of the information we collect comes directly from you. It may also come from digital technologies, other companies, or governmental entities.

<b>Directly from You</b>
We collect data from you which is necessary to prepare and file your income tax returns. Data is also collected to verify your identity, bill you for the services you have elected, and collect related payments. You provide us with information voluntarily. If you chose not to provide us with certain pieces of data that we request, we may be unable to provide you with our services. The data may be collected by us and / or outsourced tax professionals and other staff acting on our behalf.
<b>Digital Technologies</b>
We collect certain data anytime you interact with our website, advertisements, or social media pages from a computer, cell phone, tablet, or any other device with internet access. It is collected through certain web based and wireless technologies. The data collected includes geo-location, website / platform visited, what you click on and when you did so. The data may be collected by us and / or a service provider acting on our behalf.
<b>Other Companies and Governmental Entities</b>
We may collect data about you from third party entities, the IRS, state and local taxing authorities, or credit reporting agencies. This data should be shared with us in accordance with that party's privacy policy.

### **Use of Data Collected**

We use your data to provide you with our services, facilitate our internal operations, analyze, and refine our marketing programs, and offer services to other individuals which you have identified.

<b>Our Services</b>
The primary use of your data is to provide you with our services. This includes the verification of your identity, the preparation and filing of your tax returns, communicating with you to provide our services, and the billing and collection of fees for these services. These functions may be performed by us or outsourced tax professionals and staff acting on our behalf.
Additionally, we use certain digital technologies to help you contact us so that we may provide you with these services. Interaction with these technologies is limited by your own control. Such technologies include our mobile services requesting permission to dial a phone number as well as other web services requesting permission to open a new email directed to us.
<b>Our Operations</b>
We may use your data to improve our internal operations. This data may also be used to facilitate the performance of our services. This may include using pieces of your data as a unique identifier which allows us to locate and link together the various pieces of your data provided to us.



### **Use of Data Collected – continued**

<b>Marketing</b>
<p>We may use your data to analyze the demographic and geographic makeup of individuals using / not using our services. This analysis may be performed by us or a service provider acting on our behalf.</p>
<p>We may use your data to send you communications not directly related to the services that you have elected. This may include newsletters, alerts about new product offerings, and to inquire if you would like to continue utilizing our services for following tax years.</p>
<p>We may offer you certain rewards for referring our services to other individuals. You voluntarily provide us with the names and contact information for these individuals. We may contact the individuals you identified to offer them our services. Their data will be stored and used only for the purposes of this program. Should they elect to utilize our services, their data will also be subject to the entirety of this Privacy Policy.</p>

### **Sharing of Data Collected**

We may disclose your information with your consent or as required by law to our affiliated companies or third parties with whom we have relationships. Your information is shared with these parties to facilitate the services that you have elected us to provide. Examples of such data sharing include:

<b>Affiliated Companies</b>
<p>We share information with companies related by common ownership or control. These companies use this information to assist us with internal operations such as information technology support, accounting functions, etc. They may also use this information to assist us in providing services to you.</p>
<b>Service Providers</b>
<p>We may share your information with third party service providers who perform business functions on our behalf. Such functions may include call centers, outsourced staffing of tax professionals, and marketing.</p> <p>If you use social media features, scripting may be used, or we may be required to share your IP address and the identification of the page you're visiting in order to enable the proper feature or functionality. Social media features and widgets are either hosted by a service provider or directly on our site. Facebook's "Like" button or the "Share this" button are examples of these features.</p>
<b>IRS, State, and Local Taxing Authorities</b>
<p>We may be required to share information with taxing authorities to process or electronically file your tax return(s). This may include demographic, identification, financial, and device information.</p>
<b>Aggregated Data</b>
<p>While we will not disclose any individual or personal data, we may disclose the information of all or a portion of our clients at an aggregated level.</p>



### **Sharing of Data Collected – continued**

#### **Other - continued**

Should we sell our business or assets, or a portion of our business or assets, we may transfer certain client information that may be a part of that sale. You will receive a notification from us if such a sale results in a material change to this Privacy Policy.

If we believe, in good faith, that a request for disclosure is required or permitted by law pursuant to a legal request, we will disclose your information which has been requested.

We may share your information if we believe, in good faith, that doing so is necessary to protect you, our, or anybody else's rights and safety. This includes disclosing information to the appropriate federal, state, or local authorities. Such disclosures will be limited to the data necessary to protect such rights and safety or to the data required by such legal authorities.

### **Securing Collected Data**

We ensure the security of your data through the use of technological, physical, and administrative processes. These processes are in place while collecting your data, using your data, sharing your data, and storing your data.

The collection and sharing of your data occur primarily in the form of internet transmissions. The use and storage of your data occurs primarily within web-based solution platforms. As internet transmissions and electronic storage can never be completely secure, we cannot guarantee absolute security. However, we will utilize any and all security processes that are either required by law or believed by us to be necessary to protect your data.

We will ensure that any service providers, with whom we share your data, have adequate privacy policies and processes to ensure the security of your data.

### **Data Retention**

We will retain your data in accordance with all applicable laws and as long as needed in order to provide you with adequate services. At a minimum, we will maintain your data for three years, as required by the IRS.

### **Contact Us**

If you have any questions or concerns about this Privacy Policy, or any other matter which we may be able to assist, contact us by calling 1-866-TAX-0008 or emailing [contact@taxoompro.com](mailto:contact@taxoompro.com).



### **Privacy Policy Updates and Effective Date**

From time to time, we may update this Privacy Policy to better reflect our practices and encompass updates to those practices. If material changes to the policy are made, this Privacy Policy document will be updated and posted to our website as soon as feasibly possible.

Effective Date: January 1, 2021.