



## Veri-Tax, LLC Privacy Policy

Veri-Tax, LLC (“Veri-Tax”) has created this privacy policy in order to demonstrate our commitment to your privacy. We recognize and respect the privacy expectations of our customers and the requirements of applicable federal and state privacy laws. We believe that making you aware of how we use your non-public personal information, as well as the non-public personal information of your customers and clients (collectively “Personal Information”), and to whom it is disclosed, will form the basis for a relationship of trust between us and our customers. This policy describes the ways Veri-Tax collects, stores, uses and protects Personal Information. You accept this privacy policy when you sign up for or use our products, services or any other features, technologies or functionalities offered by us on our website, application or through any other means (collectively the “Veri-Tax Services”). We may amend this policy at any time by posting a revised version on our website. The revised version will be effective at the time we post it. Your continued use of Veri-Tax Services after the effective time of any change or update shall indicate your acceptance of any such change or update. To the extent that any of the terms of this privacy policy are inconsistent with the terms of any service agreement or other contract that you sign with us (a “Service Agreement”), the terms of the Service Agreement shall supersede the terms of this privacy policy.

### How we collect information about you and your company

In the course of our business, we may collect Personal Information about you from the following sources:

- From applications or other forms we receive from you or your authorized representative;
- From your transactions with, or from the services performed by, us, our affiliates, or others;
- From our Internet Web sites;
- From the public records maintained by governmental entities that we either obtain directly from those entities, or from our affiliates or others; and
- From consumer or other reporting agencies.

When you visit the Veri-Tax website or use the Veri-Tax Services, we collect information sent to us by your computer, mobile phone or other access device. This information may include your IP address, device information including but not limited to identifier, name and type, operating system, location, mobile network information and standard web log information, such as your browser type, traffic to and from our site and the pages you accessed on our website.

If you open an account or use the Veri-Tax Services, we may collect the following types of information:

- Company information including company name, address, phone, email, DBA, website URL, legal form of business and business type
- Contact information including contact name, title, phone, email, fax, technical contact name, phone, email and fax
- Purpose for which information is requested



- Billing information including billing contact, title, phone, email, and in the event that you wish to pay via credit card, name on credit card, company name on credit card, credit card type, issuing bank, credit card number, expiration date, CVC number, billing address, billing phone number and fax number related to the card that you link to your Veri-Tax account or give us when you use the Veri-Tax Services.

When you use the Veri-Tax Services, we collect information about your orders and your other activities on our website, application or when using the Veri-Tax Services and we may collect information about your computer or other access device for fraud prevention purposes.

In order to help protect you from fraud and misuse of your Personal Information, we may collect information about your use and interaction with our website, application or the Veri-Tax Services. For example, we may evaluate your computer, mobile phone or other access device to identify any malicious software or activity that may affect the availability of the Veri-Tax Services.

Finally, we may collect additional information from or about you in other ways such as contacts with our Customer Happiness team or results when you respond to a survey and from interactions with members of Veri-Tax corporate family.

### **How we use the Personal Information we collect**

Our primary purpose in collecting Personal Information is to provide you with a secure, smooth, efficient, and customized experience. We may use your Personal Information to:

- provide the Veri-Tax Services and customer support you request
- process transactions and send notices to you about your transactions
- resolve disputes, collect fees, and troubleshoot problems relating to your use of Veri-Tax Services
- prevent potentially prohibited or illegal activities, and enforce our Service Agreement
- customize, measure, and improve the Veri-Tax Services and the content and layout of our website and applications
- deliver targeted marketing, service update notices, and promotional offers based on your communication preferences

We don't sell or rent your Personal Information to third parties. We may combine your information with information we collect from other companies and use it [on a non-personally identifiable basis] to improve and personalize the Veri-Tax Services, content and advertising.

We may share your Personal Information with:

- Service providers under contract who help with fulfillment of customer orders and/or parts of our business operations such as fraud prevention, bill collection, marketing and technology services. Our contracts dictate that these service providers may not disclose your Personal Information to any



third parties and that they may only use your Personal Information in connection with the services they perform for us and not for their own benefit.

- Banking partners as required by credit card association rules for inclusion on their list of terminated merchants (in the event that you meet their criteria which includes having Veri-Tax close your Veri-Tax Account due to your breach of the Veri-Tax Service Agreement).
- Companies that we plan to merge with or be acquired by. Should such a combination occur, we will require that the new combined entity follow this privacy policy with respect to your Personal Information. If your Personal Information could be used contrary to this policy, you will receive prior notice.
- Law enforcement, government officials, or other third parties when we are compelled to do so by a subpoena, court order or similar legal procedure, or when we need to do so to comply with law or credit card rules, or when we believe in good faith that the disclosure of Personal Information is necessary to prevent physical harm or financial loss, to report suspected illegal activity or to investigate violations of our Service Agreement.
- Other third parties with your consent or direction to do so.

## **Security & protection of your data**

We take great care to safeguard all information that is transmitted to us and stored by us on our computers, servers, and databases. This protection includes the use of network intrusion prevention and detection technology, as well as other industry accepted security practices. We protect the physical location of our systems through the use of access control and monitoring technologies. We take extensive measures to limit the risk of damage or loss of any data due to hazards like fire, water damage, power loss, etc.

## **How you can access or change your Personal Information**

You can review and edit your Personal Information at any time by logging in to your account and clicking the **My Account** tab. You can also close your account by contacting Veri-Tax. If you close your Veri-Tax account, we will mark your account in our database as "Closed," but will keep your account information in our database. This is necessary in order to deter fraud, by ensuring that persons who try to commit fraud will not be able to avoid detection simply by closing their account and opening a new account. However, if you close your account, your Personal Information will not be used by us for any further purposes, nor sold or shared with third parties, except as necessary to prevent fraud and assist law enforcement, as required by law or in accordance with this Privacy Policy.

## **LIMITATION OF LIABILITY**

BY USING THE VERI-TAX SERVICES, YOU AGREE THAT OUR LIABILITY TO YOU FOR ANY VIOLATION OF THE TERMS OF THIS PRIVACY POLICY SHALL BE LIMITED TO THE FULLEST EXTENT PERMITTED BY LAW TO THE



TOTAL AMOUNT OF FEES THAT YOU HAVE PAID TO US FOR VERI-TAX SERVICES IN THE TWELVE MONTHS PRECEEDING ANY CLAIM.

**How you can contact us about privacy questions**

If you have questions or concerns regarding this policy, you should contact us by writing to us at Veri-Tax, 30 Executive Park, Suite 200, Irvine, California 92614.