

**Last Modified Date: September 3, 2021**

# Privacy Notice for Tax Status Solution

## Scope

PLEASE READ THIS PRIVACY NOTICE CAREFULLY.

This Privacy Notice ("**Privacy Notice**") details how Tax Status Inc ("**we**" "**us**" or the "**Company**") will collect, use, disclose and protect personal information ("**Personal Information**") obtained about and from taxpayers and commercial clients who use our Tax Status solution (collectively, "**End Users**"). Further, it describes the rights that you have with respect to such Personal Information.

**IMPORTANT:** Tax Status offers the TaxStatus solution solely as it relates to U.S. taxpayers. While U.S. taxpayers may utilize the Tax Status solution from anywhere in the world, Tax Status does not market the Tax Status solution to users outside of the U.S.

## Description of Our Solution

Tax Status's solution ("**Tax Status**") enables taxpayers establish an account through our web application ("**Personal Account**") and request and obtain their official personal and/or corporate Internal Revenue Service ("IRS") tax transcripts and to monitor their IRS account for activity. Commercial clients ("**Enterprise Client**") can establish an enterprise account to request and obtain official IRS tax transcripts, and monitor IRS accounts, of taxpayers who have granted consent for the Enterprise Clients to do so ("**Enterprise Account**"). Enterprise Accounts may interface with Tax Status through our web application or API.

## What Is Personal Information

Personal Information is defined differently by different laws and is sometimes referred to as "personally identifiable information" or "personal data." Generally speaking, it is a category of information that can be used to identify a specific person or that can be reasonably associated with a specific person. The particular types of data that qualify as Personal Information vary depending on the state in which you reside. However, the following data elements are examples of Personal Information in most jurisdictions:

- Name
- Postal address
- Unique personal identifier
- Internet protocol address
- Email address
- Social security number
- Driver's license number
- Date of birth
- Bank account number
- Credit card number
- Biometric identifiers (e.g., fingerprints)
- Purchasing history
- Internet browsing activity

## Tax Status's Collection and Use of Personal Information

Tax Status collects Personal Information about End Users when an account is established and when the Tax Status solution is used. Listed below are the sources from which the Company obtains Personal Information, the categories of Personal Information collected from each and the purposes for such collection.

Source of Personal Information	Personal Identifiers Collected	Purpose for Collection
<b>Taxpayers</b>	<p>Tax Status collects the following <b>personal identifiers</b> from the taxpayer when registering to use Tax Status and during each transaction:</p> <p><b>First and last name</b>  <b>Mailing address</b>  <b>Phone number</b>  <b>Email address</b>  <b>IP address</b>  <b>Taxpayer ID number</b>  <b>Password</b></p>	<p>(a) To establish and maintain a Tax Status account;  (b) To fulfill the taxpayer's requests;  (c) To respond to taxpayer inquiries and requests;  (d) To request feedback regarding a taxpayer's experience with Tax Status;  (e) To improve the operation of Tax Status;  (f) To detect, prevent, and investigate activities that may violate our policies, pose safety issues or be fraudulent or illegal, and;  (g) For security purposes</p>
<b>Enterprise Clients</b>	<p>Tax Status collects the following <b>personal identifiers</b> from End Users at an Enterprise Client when registering to use Tax Status and during each transaction:</p> <p><b>First and last name</b>  <b>Email address</b>  <b>Phone number</b>  <b>IP address</b>  <b>Password</b></p> <p>Tax Status collects Personal Information about the personnel of our Enterprise Clients as a service provider to our Enterprise Client and processes such Personal Information only as authorized by our contracts with the Enterprise Client. In addition, Tax Status collects the following personal identifiers about taxpayers from our Enterprise Clients:</p> <p><b>First and last name</b>  <b>Mailing address</b>  <b>Phone number</b>  <b>Email address</b>  <b>IP address</b></p>	<p>(a) To establish and maintain a Tax Status account;  (b) To fulfill the Enterprise Client's requests;  (c) To respond to Enterprise Client inquiries and requests;  (d) To request feedback regarding the Enterprise Client's experience with Tax Status;  (e) To improve the operation of Tax Status;  (f) To detect, prevent, and investigate activities that may violate our policies, pose safety issues or be fraudulent or illegal, and;  (g) For security purposes</p>

	<p><b>Taxpayer ID number</b> <b>Password</b></p> <p>An Enterprise Client’s processing of Personal Information about taxpayers is governed by the Enterprise Client’s privacy policy and the contract that may exist between the Enterprise Client and the taxpayer.</p>	
<b>Any End User’s Device</b>	<p><b>Internet or other electronic network activity information:</b></p> <p>When an End User interacts with Tax Status, Tax Status collects electronic network activity information and device information.</p> <p>We also collect information regarding your use of the Tax Status such as:</p> <ul style="list-style-type: none"> <li>▪ Date Tax Status account first opened</li> <li>▪ Time spent per usage</li> <li>▪ Cumulative time spent across all usage</li> <li>▪ Frequency of usage</li> <li>▪ Frequency of changes to default security settings</li> <li>▪ Tax Status features visited/buttons clicked/actions taken and frequency of each</li> </ul> <p><b>Browser Agent User</b></p> <p><b>Operating system and version</b></p> <p><b>Performance data</b></p>	<p>(a) To establish and maintain End User accounts;</p> <p>(b) To fulfill End User requests;</p> <p>(c) To improve the operation of Tax Status;</p> <p>(d) To detect, prevent, and investigate activities that may violate our policies, pose safety issues or be fraudulent or illegal, and;</p> <p>(e) For security purposes</p>
<b>From the IRS</b>	<p><b>Taxpayer name</b> <b>Taxpayer ID number (sometimes received in redacted form)</b> <b>Spouse’s name (if filing jointly)</b> <b>Spouse’s taxpayer ID number (if filing jointly) (sometimes received redacted)</b> <b>Customer file number</b> <b>Tracking number</b> <b>Third party designee name and ID number</b></p>	<p>To fulfill the taxpayer’s and/or Enterprise Client’s requests;</p>

## Data Collection Through Cookies

In addition to the above, Tax Status uses “cookies” to collect Personal Information. Cookies are text files that store information on the browser of your device when you visit a website. These text files serve a number of important functions, including to remember a website visitor and their previous interactions with the website, to help web pages load faster and to route information over a network. Cookies enable Tax Status to analyze how Tax Status is used and to monitor the performance of the Tax Status solution so we can create the best user experience. We use cookies to collect information about your browsing activities over time and across different website pages.

## Other Tracking Technologies

We also use technologies that are similar to cookies, such as tags. Tags are small portions of code that we use on the Tax Status solution to learn whether you have clicked on certain web content.

Our Site may use locally stored objects (“LSOs”) to provide certain content, such as video on demand, video clips, or animation, and a better user experience. Your browser may also offer other tools to delete or reject other LSOs; please check your browser’s settings or help menu for more information.

## How We Use Cookies and Other Tracking Technologies

- **Strictly necessary cookies** — These cookies are essential for a visitor to successfully browse the Tax Status solution and use its features. These cookies are generally first-party cookies and are session-based, which means they are deleted automatically once your browser is closed.
- **Preferences cookies** — These cookies are also known as “functionality cookies.” Tax Status may use preference cookies at times to enable the Tax Status solution to remember choices you have made in the past.
- **Statistics cookies** — These cookies are also known as “performance cookies.” They collect information about how you use Tax Status, such as which pages you visit and which links you click on. This information is aggregated and is not used to identify you. The sole purpose of these cookies is to improve the function of the Tax Status solution.

Name of First Party Cookie	Activities
“__sid”	Session ID
“__tid” stored in the browser’s Local Storage	First party tracker to identify End Users as existing Tax Status users.

## Managing Cookies

If you wish to withdraw your previously-provided consent for Tax Status to use preference and/or statistics cookies, you may adjust your browser to reject cookies from us or from any other website. This will not affect operation of strictly necessary cookies. Please note that disabling a cookie or category of cookies does not delete the cookie from your browser unless manually deleted through your browser function. Controlling cookies via browser controls may not limit our use of other technologies. Please consult your browser's settings for more information. However, blocking cookies or similar technology might prevent you from accessing some of the Tax Status features.

To find out more about cookies, including how to see what cookies have been set and how to block and delete cookies, please visit <http://www.aboutcookies.org/>.

## Tax Status's Disclosure and Sale of Personal Information

Tax Status does not "sell" Personal Information to third parties in the ordinary meaning of the word. Rather, Tax Status is a technology solution through which Enterprise Clients can request and receive official IRS transcripts after obtaining the written consent of the taxpayer to whom the transcripts pertain.

Tax Status may disclose Personal Information as necessary or appropriate in connection with any of the purposes for which we use Personal Information.

Purpose for Disclosure	To Whom and Further Detail
For our business or commercial purposes	<p>We communicate Personal Information about taxpayers to the IRS in order to request official tax transcripts. In addition, we transfer Personal Information about taxpayers to Enterprise Clients and other third party recipients at the taxpayer's requests, after receiving the consent of the taxpayer.</p> <p>Tax Status may disclose Personal Information to third-party service providers who help us develop and maintain the Tax Status solution and who assist us with other services (including, but not limited to, order processing and fulfillment, customer service, and sending client communications on our behalf).</p>
For legal purposes	<p>For instance, (i) to investigate, prevent or take action regarding actual or suspected illegal activities or fraud, situations involving potential threats to the physical safety of any person, or violations of our terms of use; (ii) to respond to or defend against subpoenas, court orders, or other legal process; (iii) to establish or exercise our legal rights; or (iv) to otherwise comply with applicable law.</p>
As part of a corporate transaction	<p>Tax Status may acquire other businesses, and other businesses may acquire us. If that occurs, the Personal Information we collect may be one of the assets examined or transferred as part of the transaction. Tax Status will not permit another business to examine the Personal Information we have collected without a confidentiality agreement. We will not transfer the Personal Information we have collected unless the recipient agrees to</p>

	provide privacy protections equal to or exceeding those established by this Privacy Notice.
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As referenced above, Tax Status uses a limited number of third-party service providers to assist us in making Tax Status available. Those third parties include:

Name	Description of Sub-processing Activities
Third Party Cloud Provider	Cloud hosting services

**Tax Status does not share Personal Information with third parties for marketing purposes.**

Each third party with whom we share Personal Information is responsible for maintaining its own privacy notice and practices related to the use and protection of End User Personal Information. Tax Status requires third party service providers with whom we share End User Personal Information to process Personal Information only as allowed in our contract with such third party service provider. We ensure that any third party service providers with whom we share Personal Information are subject to privacy and security obligations consistent with this Privacy Notice and applicable laws.

**How Long We Retain and How We Protect Personal Information**

**How long we retain Personal Information.**

Tax Status stores the Personal Information collected in a third party cloud environment.

Account set-up and device information: Tax Status retains an End User’s account set-up information until such time as the End User expressly requests deletion of his/her/their profile via the functionality provided in Tax Status. When an End User “deletes” his/her/their profile, Tax Status will delete such End User’s account set-up information from our system. An End User may also contact us directly and request that his/her/their account set-up information and taxpayer information be deleted. Once deleted, an End User cannot re-activate the deleted account; a new account must be established in order to use Tax Status.

Taxpayer information: Tax Status retains tax transcripts Tax Status until such time as the subject taxpayer expressly requests deletion of his/her/their profile via the functionality provided in Tax Status. When an End User “deletes” his/her/their profile, Tax Status will delete all of such End User’s taxpayer information including, without limitation, IRS tax transcripts and related information. A taxpayer End User may also contact us directly and request that his/her/their taxpayer information be deleted.

**How we protect Personal Information**

We work hard to protect against unauthorized access to, alteration, disclosure, and destruction of the Personal Information we hold, including:

- We use encryption to keep your Personal Information private while in transit and at rest
- We offer a range of security features to help you protect your account
- We review our information collection, storage, and processing practices, including physical security measures, to prevent unauthorized access to our systems

- We restrict access to Personal Information to Tax Status employees and service providers who need that information in order to fulfill the reason for which it is processed. Anyone with this access is subject to strict contractual confidentiality obligations and may be disciplined or terminated if they fail to meet these obligations.

## If You Are a Nevada Resident

### **Effective Date: September 3, 2021**

In accordance with Nevada law, our Privacy Notice identifies for individual taxpayers the categories of “covered information” that we collect through Tax Status and the categories of third parties with whom we may share such covered information. Please see that information above.

End Users can review and change the information in their individual user account on the “Profile” page of the Tax Status solution. However, Tax Status is not able to make changes to taxpayer information received from the IRS. Only the IRS can make changes to such information.

Tax Status does not sell “covered information” as that term is defined by Nevada law. In addition, Tax Status does not enable third parties to collect “covered information” about End User’s activities over time and across different Internet website when using Tax Status.

If Tax Status makes changes to this Privacy Notice, an End User will be notified of such upon login and will be required to acknowledge and agree to such changes.

## Access and Ability to Correct Your Information

End Users can review and change the information in their individual user account on the “Profile” page of the Tax Status solution. However, Tax Status is not able to make changes to taxpayer information received from the IRS. Only the IRS can make changes to such information. In addition, taxpayer End Users can download their IRS transcripts from the Tax Status solution at any time.

You may also contact us to request a correction via email or phone:

- Email: [privacy@Tax Status.com](mailto:privacy@Tax Status.com)
- Phone: 972.377.0025

## Children Under 17

Tax Status is not intended for use by persons under 17. We do not knowingly collect Personal Information from children under 17. If you become aware that an End User under 17 years of age is accessing Tax Status, please contact us via email or phone:

- Email: [privacy@Tax Status.com](mailto:privacy@Tax Status.com)
- Phone: 972.377.0025

We will take steps to remove Personal Information from Tax Status's servers and terminate the associated account should we determine that a child under 17 has provided Personal Information to Tax Status.

## **Changes or Updates to this Privacy Notice**

We reserve the right to revise or update this Privacy Notice at any time, and each update to the Privacy Notice will reflect the “Last Modified” Date. By clicking “I agree”, you agree to the terms contained herein. You should periodically revisit the Privacy Notice to learn of any revisions or updates.

If Tax Status makes changes to this Privacy Notice, an End User will be notified of such upon login and will be required to acknowledge and agree to such changes.

If you have specific questions about this Privacy Notice, please e-mail us at [privacy@taxstatus.com](mailto:privacy@taxstatus.com).