



Privacy Policy

Last updated: 12/18/2020

Tax-Aid ("Tax-Aid," "we," "us," "our") is committed to protecting your personal information. This Privacy Policy describes the personal information that we collect about you, how we use and disclose this information, and the steps we take to protect this information. For purposes of this Privacy Policy, "personal information" means any information that relates to you as an individual and could reasonably be used to identify you.

This Privacy Policy applies to our collection and use of personal information through this website and any related websites, applications, tools, or platforms (the "Services"), as well as through any other means where a link or reference to this Privacy Policy is provided at the time of collection. If you are a client, please see our Client Privacy Notice for more information on how we use your personal information.

Personal Information We Collect

When you access or use the Services, or otherwise interact with us, we may collect certain categories of personal information about you from a variety of sources.

Categories of personal information that we may collect from you directly include:

- Basic personal information (for example, name, date of birth, nationality, Social Security number, Individual Taxpayer Identification Number and demographic information)
- Tax filing information (for example, bank account information, employment details, earnings and expenses and family members' names, dates of birth, Social Security numbers, Individual Taxpayer Identification Numbers and earnings)
- Contact information (for example, phone number, mailing address, email address)
- Background information (for example, educational background and professional affiliation)
- Account information (for example, username and password)
- Communications (for example, submitted questions, marketing preferences, survey responses)

Categories of personal information that we may collect automatically when you use the Services include:

- Technical information (for example, browser type, IP address, cookies, and operating system)
- Usage information (for example, pages visited, search terms entered, and frequency of visits)

How We Use Your Personal Information

We may use the personal information we collect for the following purposes:

- **Provide and improve the Services.** We may use your personal information to provide and improve the Services or otherwise in connection with the administration of our business and to fulfill our contractual obligations.
- **Communication and marketing.** We may use your personal information to communicate with you about the Services, respond to your questions, or offer you additional products or services.
- **Comply with the law and exercise our rights.** We may use your personal information as reasonably necessary to assess and ensure compliance with applicable laws, legal requirements, and company policies; to protect our assets or to investigate or defend against any claims of illegality or wrongdoing (including to obtain legal advice or to establish, exercise or defend legal rights); and in response to a court order or judicial or other government subpoena or warrant.
- **Corporate transaction.** We may use your personal information in the event we undertake or are involved in or contemplating any merger, acquisition, reorganization, sale of assets, bankruptcy, or insolvency event.
- **Manage our website.** We may use your personal information to enable, analyze and improve our website, authenticate you, track pages viewed or messages opened, to personalize your browsing experience, and to provide you with tailored content.

We may also aggregate, anonymize, or otherwise de-identify your personal information and use it for any purpose permitted by applicable law.

Use of Cookies

When you use the Services, we may send one or more cookies (which are small text files containing a string of alphanumeric characters) to your computer or mobile device, to help analyze our web page flow, customize our content, measure promotional effectiveness, and promote trust and safety. You are always free to decline our cookies if your browser permits, although doing so may interfere with your ability to use the Services or certain features of the Services. We may also use Google Analytics or a similar service that uses cookies to help us analyze how users use the Services.

How and When We Disclose Your Personal Information

We may disclose your personal information to the following categories of recipients, to be used only for legitimate purposes in keeping with this Privacy Policy:

- **Service providers and professional advisors.** We may disclose your information to third party vendors who provide services in support of our business operations, such as website development, marketing management, service optimization, and data analytics.
- **Parties involved in a corporate transaction.** We may disclose your information to relevant third parties in the event of a divestiture, merger, consolidation, or asset sale, or in the unlikely event of a bankruptcy.
- **Law enforcement or other governmental entities.** We may disclose your information if required to do so by law or if we believe in good faith that such action is necessary to comply with the law, prevent unlawful activity, defend our rights, or maintain security. We also may disclose your information to government entities such as the Internal Revenue Service when filing your tax return.
- **Other third parties with your consent.** We may disclose your information to any other third party where you have provided consent to such disclosure.

Security & Retention of Personal Information

We have implemented and maintain commercially reasonable and appropriate technical and organizational measures designed to protect the confidentiality, integrity, and security of your personal information. Please note, however, that no security measures are perfect or impenetrable. We therefore cannot guaranty and do not warrant the absolute security of your personal information. We retain your personal information for no longer than reasonably necessary to fulfill the purposes for which we collected it or to comply with the law, prevent fraud, facilitate an investigation, defend against legal claims, or exercise our legal rights.

Third Party Websites

You may find advertising or other content on our site that link to the sites and services of our partners, suppliers, advertisers, sponsors, licensors and other third parties. Tax-Aid does not control the content or links that appear on these sites and is not responsible for the practices employed by websites linked to or from our site. In addition, these sites or services, including their content and links, may be constantly changing. These sites and services may have their own privacy policies and customer service policies. Browsing and interaction on any other website, including websites which have a link to our site, is subject to that website's own terms and policies.

Your Choices

You may decline to share certain information with us, in which case we may not be able to provide to you some of the features and functionality of the Services. You may update or correct your information that we have on file at any time by emailing us at [admin@tax-](mailto:admin@tax-aid.com)

aid.org or by calling us at 415-229-9240. If you do not wish to receive marketing communications from us, you can opt-out by using the unsubscribe process at the bottom of the email, but you may still receive transactional or administrative emails from us. Although your changes are reflected promptly in active user databases, we may retain all information you submit for a variety of purposes, including backups and archiving, prevention of fraud and abuse, and analytics. To make a request related to your personal information, you may contact us using the contact information provided below. In order to fulfill your request, we may require additional information from you.

Children's Privacy

We do not knowingly collect or maintain information from persons under 13 years of age ("children"), and no part of the Services is directed to children. If you are under 13 years of age, then please do not use or access the Services at any time or in any manner. If we learn that information has been collected through the Services from children and without verifiable parental consent, then we will take the appropriate steps to delete this information. If you are a parent or guardian and discover that your child has provided us with personal information without your consent, please contact us using the contact information below to request that we delete the information from our systems.

Changes to Privacy Policy

We reserve the right to make changes to this Privacy Policy at any time, without notice. We will notify you about changes that significantly impact our use of your personal information by placing a prominent notice on this website or by sending you an email. Please revisit this page periodically to stay aware of any changes to this Privacy Policy. For the avoidance of doubt, disputes arising hereunder will be resolved in accordance with the Privacy Policy in effect at the time the dispute arose.

Contact Us

Please contact us with any questions, comments or concerns about this Privacy Policy or our use of your personal information by e-mail at admin@tax-aid.org, by phone at 415-229-9240, or by mail at Tax-Aid, 235 Montgomery Street, Suite 1155, San Francisco, CA 94104.