

CALIFORNIA PRIVACY NOTICE

This California Privacy Notice (“Notice”) supplements the information contained in Landmark Tax Group’s general Privacy Policy and applies solely to California “consumers,” as that term is defined in the California Consumer Privacy Act of 2018 (CCPA). We adopt this notice to comply with the CCPA, and any terms defined in the CCPA have the same meaning when used in this Notice.

Information We Collect

We collect information that identifies, relates to, describes, references, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer, household, or device (“personal information”). Under the CCPA, personal information *does not* include: (i) publicly available information from government records; (ii) deidentified or aggregated consumer information; or (iii) personal information protected by other California or federal privacy statutes, such as HIPAA.

Within the last twelve (12) months, we may have collected the following categories of personal information about you:

Category	Examples
A. Identifiers.	Your full name, alias, postal address, Internet Protocol address, email address, account name, Social Security number or other government-issued identification number, driver’s license number, passport number, or other similar identifiers.
B. Personal info categories listed in the California Customer Records statute (Cal. Civ. Code 1798.80(e)).	A name, signature, Social Security number, physical characteristics or description, address, telephone number, passport number, driver’s license or state identification card number, insurance policy number, education, employment, employment history, bank account number, credit card number, debit card number, or any other financial information. Some personal information included in this category may overlap with other categories.
C. Protected classification characteristics under California or federal law.	Age (40 years or older), race, color, ancestry, national origin, citizenship, religion or creed, marital status, medical condition, physical or mental disability, sex (including gender, gender identity, gender expression, pregnancy or childbirth and related medical conditions), sexual orientation, veteran or military status, genetic information (including familial genetic information).
D. Commercial information.	Records of personal property, products or services purchased, obtained, or considered, or other purchasing or consuming histories or tendencies.
F. Internet or other similar network activity.	Browser type, operating system, browsing history, search history, information on a consumer’s interaction with the Website, IP address, number of visits, times spent viewing webpages, date and time of Website visit, connection speed, application, or advertisement.

G. Geolocation data.	Physical location or movements.
I. Professional or employment-related information.	Current or past job history, company name, employer, job title, or supervisor.
K. Inferences drawn from other personal information.	Profile reflecting a person's preferences, characteristics, psychological trends, predispositions, behavior, attitudes, intelligence, abilities, and aptitudes.

Information Sources

We collect the information described above from the following sources:

- You provide the information directly to us. We collect some information directly from you when you provide it to us, such as by registering for or participating in a webinar; registering for or using our Secure File Exchange, Client Portal, or Client Accounting Portal; signing up for e-mail newsletters from our Website; completing forms or surveys on our Website; or sending us emails or messages.
- Technologies automatically collect the information when you access or use our Services. Information collected automatically may include your usage details, Internet protocol address ("IP address"), and information collected through cookies, web beacons, and other tracking technologies.

Please refer to our general Privacy Policy for more information on the types of automatic data collection technologies we use to collect information from our Services.

Uses of Personal Information

We may use or disclose the personal information we collect for one or more of the following business purposes:

- To fulfill our contractual obligations to you. For example, if you provide us with personal information in order for us to conduct an audit or prepare a tax return, we will use that information to provide that service to you.
- To create, maintain, customize, and secure your account with us.
- To notify you about changes to our Website or any products or services we offer or provide through it.
- To respond to your inquiries or to provide you with email alerts, event registrations and other notices concerning our products or services, or events or news, that you request from us or that may be of interest to you.
- To carry out our obligations and enforce our rights arising from any contracts entered into between you and us, including without limitation our Legal Notice, our Privacy Policy, or any other contract, such as for billing and collections.

- To improve our Website, enhance our Services, or optimize your user experience with our Services.
- To market our products and services to Website visitors, including without limitation by analyzing data or metrics about our Website to send more targeted messages to visitors of our Website.
- To protect the rights, property, security, or safety of us, our clients, or others
- To respond to law enforcement requests and as required by applicable law, court order, or governmental regulations.
- As described to you when collecting your personal information or as otherwise set forth in the California Consumer Privacy Act (CCPA).
- For testing, research, analysis, and product development.
- To evaluate or conduct a merger, divestiture, restructuring, reorganization, dissolution, or other sale or transfer of some or all of our assets, whether as a going concern or as part of bankruptcy, liquidation, or similar proceeding, in which personal information held by us is among the assets transferred.

We will not collect additional categories of personal information or use the personal information we have collected for materially different, unrelated, or incompatible purposes without providing advance notice to you.

Disclosures of Personal Information for a Business Purpose

In the preceding twelve (12) months, we may have disclosed the following categories of personal information to a third party for a business purpose:

Category A: Identifiers.

Category B: California Customer Records personal information categories.

Category C: Protected classification characteristics under California or federal law.

Category D: Commercial information.

Category F: Internet or other similar network activity.

Category G: Geolocation data.

Category I: Professional or employment-related information.

In the preceding twelve (12) months, we have disclosed your personal information to the following categories of third parties:

- Service providers. We may have shared Identifiers, California Customer Records personal information categories, Protected classification characteristics under California or federal law, Commercial information, Internet or other similar network activity, Geolocation data, and Professional or employment-related information with our service providers.

- Internet cookie information recipients, like Google. We share Identifiers, Internet or other similar network activity, and Geolocation data with Google.

Sales of Personal Information

In the preceding twelve (12) months, Landmark Tax Group has not “sold” any personal information.

Your Rights and Choices

The CCPA provides California residents with specific rights regarding their personal information. This section describes your CCPA rights and explains how to exercise those rights.

1. Right to Access to Specific Information and Data Portability Rights

You have the right to request that we disclose the following information to you about our collection and use of your personal information over the past 12 months:

- The categories of personal information we have collected about you.
- The categories of sources of the personal information we collected about you.
- Our business or commercial purpose for collecting that personal information.
- The categories of third parties with whom we share that personal information.
- The specific pieces of personal information we collected about you (also called a data portability request).

We do not provide these access and data portability rights for B2B personal information.

2. Right to Request Deletion

You have the right to request that we delete any of the personal information that we collected from you and retained, subject to certain exceptions. Once we receive and confirm your verifiable consumer request, we will delete (and direct our service providers to delete) your personal information from our records, unless an exception applies.

We may deny your deletion request if retaining the information is necessary for us or our service provider(s) to:

- Complete the transaction for which we collected the personal information, provide a service you requested, take actions reasonably anticipated within the context of our ongoing business relationship with you, or otherwise perform our contract with you.
- Detect security incidents, protect against malicious, deceptive, fraudulent, or illegal activity, or prosecute those responsible for such activities.
- Debug products to identify and repair errors that impair existing intended functionality.
- Exercise a right provided for by law.

- Comply with the California Electronic Communications Privacy Act (Cal. Penal Code § 1546 et. seq.).
- Enable solely internal uses that are reasonably aligned with consumer expectations based on your relationship with us.
- Comply with a legal obligation.
- Make other internal and lawful uses of that information that are compatible with the context in which you provided it.

We do not provide these deletion rights for B2B personal information.

3. Right to Non-Discrimination

We will not discriminate against you for exercising any of your CCPA rights. Unless permitted by the CCPA, we will not:

- Deny you services.
- Charge you different prices or rates for goods or services, including through granting discounts or other benefits, or imposing penalties.
- Provide you a different level or quality of services.
- Suggest that you may receive a different price or rate for goods or services or a different level or quality of goods or services.

However, we may offer you certain financial incentives permitted by the CCPA that can result in different prices, rates, or quality levels. Any CCPA-permitted financial incentive we offer will reasonably relate to your personal information's value and contain written terms that describe the program's material aspects. Participation in a financial incentive program requires your prior opt-in consent, which you may revoke at any time.

How to Exercise Your CCPA Rights

To exercise the access, data portability, and deletion rights described above, please submit a verifiable consumer request to us by either:

- Emailing us at help at landmarktaxgroup.com, or
- Mailing your request to:

Landmark Tax Group
19046 Bruce B. Downs Blvd, #1520
Tampa, FL 33647

Only you, or someone legally authorized to act on your behalf, may make a verifiable consumer request related to your personal information. You may also make a verifiable consumer request on behalf of your minor child.

You may only make a verifiable consumer request for access or data portability twice within a 12-month period. You must provide sufficient information that allows us to reasonably verify you are the person about whom we collected personal information, and you must describe your request with sufficient detail that allows us to properly understand, evaluate,

and respond to it. We cannot respond to your request or provide you with personal information if we cannot verify your identity or authority to make the request and confirm the personal information relates to you.

Making a verifiable consumer request does not require you to create an account with us. However, we do consider requests made through your password-protected account sufficiently verified when the request relates to the personal information associated with that specific account.

We will only use personal information provided in a verifiable consumer request to verify the requestor's identity or authority to make the request.

Authorized Agents

If you designate an authorized agent to make a request on your behalf, your authorized agent must provide us with your signed, written permission to submit the request on your behalf. We may deny a request from an authorized agent if we are unable to verify that the agent has your authorization. Please send authorized agent requests to help at landmarktaxgroup.com, and include the following information:

- Authorized agent's full name
- Authorized agent's email address
- Consumer's full name
- Consumer's email address
- Consumer's state of residence
- Attach the consumer's signed, written authorization for the agent to act on the consumer's behalf
- Describe the request and, if applicable, the personal information subject to the request

Response Timing and Format

We endeavor to respond to a verifiable consumer request within forty-five (45) days of its receipt. If we require more time (up to 90 days), we will inform you of the reason and extension period in writing.

If you have an account with us, we will deliver our written response to that account. If you do not have an account with us, we will deliver our written response by mail or electronically, at your option.

Any disclosures we provide will only cover the 12-month period preceding the verifiable consumer request's receipt. If we are unable to respond to your request, we will also explain the reasons we cannot comply with the request. For data portability requests, we will select a format to provide your personal information that is readily usable and should allow you to transmit the information from one entity to another entity without hindrance.

We do not charge a fee to process or respond to your verifiable consumer request unless it is excessive, repetitive, or manifestly unfounded.