

# Digi Tax and Bookkeeping Services LLC Digital Privacy Notice

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Protecting your personal information is important to us. The following guidelines set forth our general privacy practices and principles that apply to information we collect through the following products and services, which are owned or operated by Digi Tax and Bookkeeping services LLC., or companies related by common ownership or control (collectively, "we," "us," or "our"):

We utilize administrative, technical, and physical safeguards to protect your information. We protect information submitted to us, both during transmission and once we receive it. Please see "How do we secure your information?" for more information. If you have any questions about the security of our services, you can contact us by emailing us at [us.digitax@gmail.com](mailto:us.digitax@gmail.com)

## A. Types of Information We Collect

As part of providing products and services to you, we may collect information, including personal information, about you, your spouse, your dependents, or your business when you use our services.

Personal information is data that can be used to identify a person individually. The information we may collect includes, but is not limited to:

- Contact Information (e.g., name, phone number, address, and email address);
- Social Security Number and other government identification numbers (e.g., EIN, Driver's License Number, and ITIN);
- Date of Birth;
- Financial Information (e.g., income, revenue, assets, credits, deductions, expenses, and bank account information);
- Payment Data (e.g., checking, debit and credit card account numbers, balances and payment history);
- Health Information (e.g., health insurance status and financial information related to payment for healthcare services);
- Demographic Information;
- Professional or employment-related information; and
- Education information.

## **B. Where do we get this information**

You provide most of the information we collect. We also receive information through certain digital technologies when you interact with us. Finally, other companies and government entities may share information with us.

We collect information directly from you.

To deliver the products and services you request, customize your experience, and better serve you, we collect information you voluntarily provide as part of using or requesting our products and services. This information includes information you provide as part of preparing your tax return, electronically filing your tax return, It also includes information from documents you choose to upload to provide to us. If you choose not to provide certain information we request, we may be unable to serve you as our products, services, tools or calculators may rely upon this information.

We collect information when you use our services. The Internal Revenue Service (IRS) or state taxing authorities may require that we collect certain personal and system information in connection with preparing or electronically filing your tax return. This may include your name, social security number. We collect information from other companies and government entities. We also collect information when you request services or information from us or companies with whom we have a business relationship. To improve the security of our services, to protect your identity, and to protect your information, we may verify your personal information.

We do not disclose any information about you(client) or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

- To comply with government laws or a validly issued and enforceable subpoena or summons.
- In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.
- As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.

### **C. Confidentiality and Security of your Information**

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to only tax preparers working with us and who are registered with the IRS who must use that information to provide services to you. We also have safeguards to guard your personal information from unauthorized access.

The security of your personal information is important to us. We utilize administrative, technical, and physical safeguards to protect your information.

We protect information submitted to us, both during transmission and once we receive it. Nevertheless, no method of transmission over the Internet, or method of electronic storage, is 100% secure. Therefore, we cannot guarantee its absolute security. We do not keep physical copies of your documentation. All tax documents are stored in digital form with our tax preparation technology provider Intuit that is subject to IRS and other technology audits. We may use other technology and software providers that are necessary to provide necessary services to you. We maintain physical, electronic and procedural safeguards that comply with applicable law that are designed to restrict access to your information. These safeguards include computer and communication security measures reflected in system design, password protection, and data management practices; and other measures to restrict access to the data we hold in electronic forms.

All internet data transmission is encrypted using secure socket layer technology (SSL). The IRS requires us to retain filed tax returns for a period of at least three years.

### **Business partners' products and services, including social media features**

This Privacy Notice does not apply to products or services offered by our business partners on or through our services (such as bank partners who offer Refund Transfers). You will be able to recognize when a business partner is associated with your transaction when its logo appears or is shown with our logo. You should carefully read the privacy notices and any terms and conditions applicable to such business partner's products or services. When you request products or services from such companies, you give us permission to provide these business partners with information about you necessary to fulfill or process your request.

Our services may contain links to business partners' websites or offers for services from business partners. This Privacy Notice does not apply to these products or services. You should carefully read the privacy notices of the business partners providing such products or services and any terms and conditions applicable to such products or services.

Your use of social media features may use scripting or may require us to share your IP address and which page you are visiting to enable the feature to function properly. Social media features and widgets are either hosted by a business partner or hosted directly on our site, and your interactions with these features are governed by the privacy notice of the company providing it. Examples of these features are the Facebook "Like" button, the "Share This" button, and interactive mini-programs that run on our services.

## **CONTACT US**

If you have questions or concerns regarding this Privacy Notice, contact us by email at [us.digitax@gmail.com](mailto:us.digitax@gmail.com) or by calling 6094744065, or by mail through the mailing address P.O. Box 84, Rocky Hill, NJ 08553 USA

## **PRIVACY NOTICE UPDATES**

We may update this Privacy Notice to reflect changes to our information practices. If we make a material change to this Privacy Notice, including a material change in the way we use any personal information collected, we will notify you by using one of the following methods at least thirty (30) days prior to the effective date of such change: (1) we will post a notice on our website describing the change; or (2) we will send you an email notifying you of the change.

## **EFFECTIVE DATE**

This Privacy Notice is effective January 1, 2022.