

PRIVACY POLICY

CrossLink Family of Companies

Effective Date: October 15, 2026

IMPORTANT INFORMATION:

We have made important updates to our Privacy Policy, effective October 15, 2026 (the “Effective Date”). By using our Sites or Services on or after the Effective Date, you acknowledge that you have reviewed this updated Privacy Policy.

This Privacy Policy describes how the CrossLink Family of Companies—CrossLink Professional Tax Solutions, LLC, CrossLink Tax Tech Solutions, LLC, and Audit Allies, LLC (collectively, “CrossLink,” “we,” “us,” or “our”)—collects, uses, discloses, and protects your information. It applies to information collected through websites, portals, applications, and services operated by one or more members of the CrossLink Family, including www.crosslinktax.com, www.crosslinktaxtech.com, www.auditallies.com, and iprotect-tax.com (collectively, the “Sites”), and through products and services that reference this Privacy Policy (collectively, the “Services”). The CrossLink entity providing a particular product or service may be identified in the applicable agreement or product notice. Certain products, services, or features may be subject to additional privacy notices describing specific data practices. Please review any such notices that apply to your use of those products, services, or features.

Scope of this Privacy Policy

This Privacy Policy applies to individuals located in the United States. Our Services are intended only for U.S. users, and we do not represent that we comply with non-U.S. laws such as the GDPR or UK GDPR. It applies to information we collect online and offline—through our websites, mobile applications, and communications with CrossLink—unless stated otherwise.

CrossLink maintains administrative, technical, and physical safeguards designed to comply with applicable IRS, Gramm-Leach-Bliley Act, and FTC Safeguards Rule requirements and informed by IRS Security Summit guidance. We collect and retain personal information as reasonably necessary to provide and support our Services, operate our business, and comply with legal and regulatory requirements, as described in this Privacy Policy.

In some situations, CrossLink acts as a service provider/processor, handling personal information solely on behalf of another business and only according to their instructions. In other situations, CrossLink acts as an independent business/controller that determines how and why personal information is processed. This Privacy Policy describes our practices when acting in that independent role.

In the event of any conflict between this Privacy Policy and the terms of an agreement under which CrossLink acts as a service provider or processor, including any data-processing terms, the agreement with the business customer will govern. When CrossLink processes personal information, including Tax Return Information, as a service provider or processor, CrossLink acts solely on behalf of and under the instructions of that business customer, who is responsible for providing any required privacy notices to individuals. This Privacy Policy explains how CrossLink collects, uses, retains, discloses, and protects your information and describes your choices regarding access, correction, and use of your personal information.

Your privacy is important to us. CrossLink does not share non-public personal information with third parties outside the CrossLink Family of Companies without your consent, except as described in this Privacy Policy. For additional information or questions, please see the section titled “How to Contact Us.”

The Centralization of Your Information

We use the information you provide across our integrated CrossLink platform to deliver, support, and improve our products and services. Information you enter into one CrossLink product or service becomes part of your CrossLink Account and may be used within the CrossLink Family of Companies to provide a consistent experience.

Internal sharing never includes Tax Return Information unless permitted under 26 U.S.C. §7216, its regulations, or a valid written taxpayer consent.

In some circumstances and where required by law or supported by our systems, you may have the ability to limit certain internal uses or sharing of your personal information. These options may be available through your account settings or by contacting us.

Information We Collect

We collect information from you directly, automatically from the devices you use to interact with us, and from third parties such as analytics, identity-verification, and financial-service providers.

Information You Provide Directly

The personal information we collect depends on your interactions with CrossLink, the Sites, and the services you use. You may provide personal information when you visit our Sites, create an account, contact support, participate in training or surveys, use our software, or purchase products or services. To help you understand what we collect, the following chart summarizes the categories of personal information, examples, purposes, and typical sources:

Categories of Personal Information We Collect

Category	Examples	Purpose of Collection	How We Collect It
Identifiers	Name, mailing address, email address, phone number, account credentials, IP address	Account creation, identity verification, communication, fraud prevention	Provided directly by you; collected automatically through your device or browser
Government Identifiers	Social Security number, driver's license number, EIN, taxpayer identification numbers	Tax preparation, identity verification, e-file compliance	Provided by tax professionals or entered into the CrossLink platform
Financial Information	Bank-account details, payment information, refund-transfer data	Billing, bank-product services, processing transactions	Provided by you or by integrated bank-product partners
Professional Information	ERO details, PTIN, firm information, employment data	Enrollment, compliance, tax-office operations	Provided directly by you
Commercial Information	Purchases, licenses, service-use data	Account management, product fulfillment, analytics	From your transactions or profile activity
Internet / Technical Data	Device identifiers, browser type, IP address, session activity, cookie data, usage logs	Security, service improvement, analytics, troubleshooting	Automatically collected through cookies, logs, and tracking technologies
Geolocation Data	Approximate location based on IP address; precise location only when a feature is enabled with permission	Security, fraud detection, compliance requirements	Automatically collected through your browser or device; precise data only with permission
Customer Support Data	Call recordings, chat transcripts, support tickets	Customer service, troubleshooting, compliance	Provided by you during interactions with CrossLink
Tax Return Information (as defined by 26 U.S.C. §7216)	SSNs, income, deductions, dependents, employment details, return data, electronic-filing data	Tax preparation, e-file processing, fraud prevention, system maintenance	Provided by tax professionals and processed by CrossLink in accordance with §7216
Inferences	Preferences, usage patterns, product interests	Service improvement and personalization; never applied to Tax Return Information except as expressly permitted under 26 U.S.C. §7216	Generated internally from usage data

Additional Information You May Provide

Depending on your interactions with CrossLink, you may also provide:

- **Account and purchase information:** Contact details, profile photo, payment/billing information (collected by us or our third-party processor), and login credentials.
- **Identification information:** Government-issued IDs used for identity verification or to support tax-filing requirements.
- **Customer-support and feedback information:** Support inquiries, survey responses, product-research participation, training interactions, and feedback.
- **Financial, business, or content information:** Business records, invoices, payroll data, expenses, or other financial or operational data uploaded to our systems.
- **Employment and recruiting information:** Information submitted when applying for a job.
- **Public interaction information:** Information you provide on our social media pages, blogs, community forums, surveys, events, promotions, or testimonials.
- **Information from other CrossLink entities:** We may receive information from affiliates within the CrossLink Family of Companies to help deliver or support services.

- **Any other information you submit:** Any additional information you choose to provide when interacting with CrossLink.

Tax Return Information (26 U.S.C. §7216)

When tax professionals use our software or Services to prepare or file tax returns, they may input Tax Return Information into the CrossLink platform. This may include Social Security numbers, dates of birth, income amounts, deductions, credits, dependent information, employment details, electronic-filing data, and other information required to prepare or file a tax return.

CrossLink receives and processes Tax Return Information solely to provide and support tax preparation and electronic-filing services. In accordance with 26 U.S.C. §7216 and Treasury Regulation §301.7216-1 et seq., CrossLink may use Tax Return Information only for purposes expressly permitted by law, including:

- maintaining and securing our software, systems, and infrastructure
- detecting, preventing, and responding to fraud or security incidents
- providing customer support and technical assistance
- complying with applicable federal and state laws, regulations, and legal processes
- creating and using de-identified statistical compilations only as permitted under Treasury Regulation §301.7216-2(o), including applicable anonymity, aggregation, purpose, and disclosure restrictions, to improve tax-product performance, reliability, and accuracy

CrossLink will not use or disclose Tax Return Information for marketing, advertising, or any other non-permitted purpose unless authorized by a valid written taxpayer consent meeting the requirements of Treasury Regulation §301.7216-3. CrossLink does not condition the use of its software or services on a taxpayer providing such consent.

Information We Collect Automatically

When you use our Sites, products, or services, we and our service providers automatically collect certain information through cookies, pixels, tags, web beacons, log files, and similar technologies. This information may include:

- **Device and network information:** IP address, device type, unique identifiers, browser type, operating system, and Internet service provider.
- **Usage and analytics information:** Pages viewed, features used, interactions (clicks, scrolling, mouse movements), session duration, and other activity within our Sites or products.
- **Location information:** Approximate location derived from your IP address. Certain features may collect precise location or device-motion data with your permission.
- **Cookies and tracking data:** Cookie identifiers, analytics tags, and other tracking technologies used to operate, secure, and improve our Sites.

We use these technologies to maintain security, detect and prevent fraud, analyze usage trends, improve performance, and troubleshoot issues. Our Sites use tools such as Google Analytics to understand usage and traffic patterns. Disabling cookies or similar technologies may reduce functionality.

As our Sites and Services evolve, new features may collect new or different types of information. Where a new feature materially changes the categories of personal information collected or the purposes for which information is used, CrossLink will provide any notice or obtain any consent required by law at or before collection.

Information Provided by Others

Some features of our platform allow or require others to provide information about you. For example, tax professionals, business partners, authorized users, or other individuals within your organization may enter your information into our software. If you provide information about others, you must do so only if you have the authority or consent required by law.

Information From Other Sources

We may also obtain information about you from third parties, consistent with applicable law and any restrictions imposed by the source. Examples include:

- **Linked service providers:** Services you choose to connect, link, or sync with your CrossLink account.
- **Embedded third-party partners:** Integrated providers within the CrossLink platform, such as bank-product servicers, payment processors, and identity-verification vendors.
- **Identity-verification and data-validation partners:** Third parties that verify identity, confirm business details, or validate data.
- **Customer-support vendors:** Partners assisting with support and troubleshooting.
- **Cybersecurity and fraud-prevention partners:** Providers that help detect, prevent, or respond to fraud, security incidents, or illegal activities.
- **Communication and social media platforms:** Email and messaging platforms or social networks through which you interact with CrossLink.

- **Joint marketing or partnership programs:** Organizations with which we co-offer products, promotions, or services.
- **Public and governmental sources:** Public records, government agencies, and federal or state tax authorities.
- **Authorized resellers and distribution partners:** Partners that sell, provision, support, or administer CrossLink products, including onboarding, licensing, training, and usage support.

We may receive additional information from other third parties not listed above, and when we do, we protect and process that information consistent with this Privacy Policy and applicable law.

How We Use Your Personal Information

CrossLink may use information collected through the Sites—including personal information—for the following purposes, which may be explained further in notices at or before collection:

- **Tax preparation and related services:** When tax professionals use our software or services to prepare, process, or file tax returns, they may input or transmit Tax Return Information into the CrossLink platform. Section 7216 of the Internal Revenue Code and Treasury Regulation §301.7216 govern the use and disclosure of this information. We use Tax Return Information only in accordance with these laws to provide and support tax preparation and electronic filing services for tax professionals, including maintaining and securing our systems, preventing fraud, providing customer support, and complying with applicable legal obligations. We do not use or disclose Tax Return Information for marketing, advertising, or analytics unrelated to permitted tax-product performance unless authorized by a valid written taxpayer consent under Treas. Reg. §301.7216-3.
- **Providing and maintaining services:** To perform and deliver our services, including maintaining accounts, verifying customer information, processing or fulfilling orders and transactions, providing customer support, processing payments, providing analytics, or performing other necessary business functions.
- **Transactions and preferences:** To fulfill transactions, process registrations, and remember your preferences when you return to our Sites.
- **Business relationship management:** To administer and develop our relationship with you and any company you represent.
- **Personalization:** To personalize your online experiences and tailor content, recommendations, and offers displayed on our Sites or elsewhere.
- **Marketing, advertising, and promotions:** As permitted by law, to perform and provide advertising and marketing services, including targeted advertising; to send marketing messages you have requested or that we believe may interest you; to notify you of related products, services, or promotions; to personalize advertisements on our Sites and third-party platforms; and to measure advertising effectiveness. For example, we may use your email address or phone number to contact you about products, offers, or information from us or our third-party partners. CrossLink does not use or disclose Tax Return Information for marketing or promotional purposes except as expressly permitted under 26 U.S.C. §7216 or with a valid written taxpayer consent.
- **Service improvement:** To analyze usage trends, improve our Sites, products, and services, and enhance the overall customer experience.
- **Security, fraud prevention, and compliance:** To prevent, detect, investigate, or take action regarding suspected or actual fraudulent or illegal activity; to comply with applicable laws, regulations, and legal processes (including subpoenas or court orders); and to enforce our terms, policies, or agreements.
- **Data breach response:** To investigate, notify, and mitigate unauthorized access consistent with applicable breach-notification laws. Where required, we will notify affected individuals and regulators within required timeframes.
- **Other lawful purposes:** For other purposes that are compatible with the disclosed purpose or where you provide additional consent.

CrossLink processes personal information as reasonably necessary and proportionate to provide and improve the Services, fulfill transactions, secure our systems, prevent fraud, comply with law, and carry out the other purposes disclosed in this Privacy Policy. We obtain consent where required by applicable law.

We may combine personal information, other than Tax Return Information, collected from multiple sources to better achieve these purposes.

Some information we process may be considered Sensitive Personal Information or Sensitive Data under applicable state law, including government identifiers, account credentials, financial-account information, precise geolocation when enabled, and identity-verification documents or results. CrossLink uses sensitive information only for purposes reasonably necessary to provide the Services, verify identity, protect accounts, prevent fraud, comply with law, or as otherwise disclosed and permitted. CrossLink does not use government identifiers or account credentials for targeted advertising or cross-context behavioral advertising. Depending on applicable law, you may have rights to limit or consent to certain processing of sensitive information.

How We Share Your Personal Information

CrossLink shares personal information only as permitted by applicable law, including 26 U.S.C. §7216, the Gramm-Leach-Bliley Act, the FTC Safeguards Rule, and applicable state privacy laws.

CrossLink does not sell personal information for monetary consideration. CrossLink may share limited non-tax personal information—such as online identifiers, device data, and usage activity collected through cookies and similar technologies—with advertising and analytics partners for cross-context behavioral advertising. This activity qualifies as “sharing” under the California Consumer Privacy Act and may qualify as “targeted advertising” or a “sale” under certain other state privacy laws even though no money is exchanged. You may opt out of this activity at any time using the “Do Not Sell or Share My Personal Information” link on our Sites, by enabling a recognized universal opt-out signal such as Global Privacy Control, or by contacting us.

Tax Return Information is never sold or shared for cross-context behavioral advertising, marketing, or analytics unrelated to tax-product performance, whether in identified or de-identified form, except as expressly permitted under 26 U.S.C. §7216 or authorized by a valid written taxpayer consent under Treas. Reg. §301.7216-3.

How We Share Your Personal Information — Summary Chart

Sharing Category	What We Share	Recipients	Tax Return Information / Legal Limits
At Your Direction	Personal information you authorize us to share to enable a third-party app, integration, or other non-CrossLink service	Third-party apps, integrations, services	Tax data: No Shared only when you enable or request a connection; governed by the third party’s policy
At the Direction of Your Tax Professional	Tax Return Information required for filing or approved disclosures	IRS, state tax authorities, third-party tax-preparation, software, and AI-enabled service providers the tax professional enables, and other recipients permitted under §7216, including by written consent where required	Tax data: Yes—only as directed and permitted by law Must comply with §7216 and Treas. Reg. §301.7216-2; CrossLink shares Tax Return Information only as permitted by law
Legal, Regulatory & Security Requirements	Personal information; Tax Return Information only within statutory or regulatory exceptions	Courts, IRS, state agencies, law enforcement	Tax data: Yes—limited by §7216 exceptions Only when required or permitted by law to support tax administration, enforce rights, or prevent, detect, or respond to fraud or security threats
Bank-Product & Financial Service Partners	Information needed for refund transfers or other financial products you or your tax professional request	Bank-product providers, financial institutions, underwriters	Tax data: Only with valid §7216 consent or other statutory permission Used solely to deliver the financial product requested
Corporate Transactions	Business and customer information as part of a transaction	Successor entities in a merger, acquisition, or restructuring	Tax data: Restricted Transfers must comply with §7216 and all applicable privacy obligations
CrossLink Family of Companies (Affiliates)	Personal information for operations and support	CrossLink affiliates and subsidiaries	Tax data: Only if permitted under §7216 or with consent Used for internal operations and services
Service Providers & Contractors	Information needed to perform contracted services, such as hosting, support, security, analytics, payment, and communications	Hosting, payment, communications, analytics, and security vendors	Tax data: No Tax Return Information unless permitted by law Providers may process information only to perform services for CrossLink and must protect it under applicable contractual and legal requirements
Authorized Resellers & Distribution Partners	Account and administrative information	Resellers and distributors supporting onboarding or licensing	Tax data: No Tax Return Information unless permitted or consented Must follow contractual and legal privacy obligations

Sharing Category	What We Share	Recipients	Tax Return Information / Legal Limits
Integrations, Events & Non-CrossLink Services	Registration and connection information	Event partners and integration providers	Tax data: No (Tax Return Information is shared with integrated tax-preparation providers only as described in “At the Direction of Your Tax Professional”) You direct the sharing; governed by the partner’s privacy policy
Advertising, Analytics & Social Media (Non-Tax Data Only)	Limited account, online-identifier, device, cookie, or usage information	Advertising platforms, analytics partners, and social networks	Tax data: No—Tax Return Information is never used Used for analytics, advertising, personalization, and measurement, subject to applicable opt-out rights
Social-Media & Marketing Tool Integrations	Content or account information needed for optional tools	Social-media management or marketing platforms	Tax data: No Tax Return Information Only when you enable optional features
Testimonials, Forums & Public Content	Content you provide publicly	Website visitors and the public	Tax data: No Tax Return Information Published with your consent; forum content is public

Other Lawful Disclosures

CrossLink may also disclose personal information for other purposes that are:

- compatible with the purposes described in this Privacy Policy
- disclosed to you at the time of collection, or
- carried out with your additional consent, where required.

Promotions (Sweepstakes, Contests, and Raffles)

We may offer sweepstakes, contests, raffles, or similar promotional programs (“Promotions”), sometimes jointly with third parties. Participation may require registration or the submission of personal information.

Your information will be used and disclosed as described in the Promotion’s official rules, which may permit the sponsor(s), where allowed by law, to use your name, likeness, or other identifiers for promotional purposes. Information may also be shared with third parties or made public as needed for winner selection, prize fulfillment, legal compliance, or publication of a winners list.

If the terms of a Promotion conflict with this Privacy Policy, the Promotion’s official rules will govern.

Links to Other Websites and Interactive Features

Links to Other Websites

Our Sites may contain links to websites or online services operated by third parties. Please note that CrossLink is not responsible for the privacy practices, content, or security of such third-party websites. We encourage you to review the privacy policy of any website you visit that collects or uses personal information.

Interactive Features

We may engage vendors to provide certain interactive features on our Sites. Your use of these features is voluntary, and we may retain the information you submit through them. For example, our Sites may offer an interactive chat feature—staffed by either a virtual or live agent—to answer questions or provide customer support. When you participate in a chat or similar feature, the contents of your communication may be captured and stored as a transcript. By using these features, you acknowledge that our vendors may process information obtained through them to provide the service on our behalf, consistent with this Privacy Policy.

Specific Information Regarding SMS Program

If you have opted in to CrossLink’s SMS Program, the following information applies. For more information regarding our SMS Program, visit the applicable CrossLink Site, and select the “SMS Texting Terms and Conditions” link in the website footer.

Program Description

You will only receive text messages from CrossLink after you have provided prior express written consent in accordance with the federal Telephone Consumer Protection Act (TCPA) and applicable FCC regulations. Your consent to receive text messages is not a condition of purchasing any goods or services from CrossLink. CrossLink may use an automatic telephone dialing system (“autodialer”) to deliver text messages to you. Text messages may include but not be limited to assistance in completing and/or e-filing your tax return, informational or support purposes, notification of transaction approval, payment reminders and notifications, and servicing your account.

Message Frequency

After opting in to our SMS Program, you may receive an initial confirmation text message. After that, the specific number of text messages may vary depending on how you use CrossLink’s services and the types of text messages you registered to receive.

Cost

Message and data rates may apply to each text message sent or received, as provided in your mobile telephone service plan, in addition to any applicable roaming charges. CrossLink does not impose a separate fee for sending text messages.

How to Opt-Out

To stop receiving text messages, reply STOP, QUIT, END, REVOKE, OPT OUT, CANCEL, or UNSUBSCRIBE to the short code from which you received the message. We will also honor any other reasonable method of revoking consent as required by applicable law. CrossLink will honor a valid revocation request as soon as reasonably practicable and no later than 10 business days after receipt. We will send one final non-marketing message confirming your request and will not send additional messages covered by your revocation unless you later opt in again. For assistance, reply HELP or contact CrossLink Support at support@crosslinktax.com or (800) 345-4337. Message and data rates may apply.

Information We Collect

Data obtained from you in connection with the SMS Program may include your name, address, mobile phone number, your mobile service provider’s name, and the date, time, and content of your messages. Our use of this information will be in accordance with this Privacy Policy. Your mobile carrier and other service providers may also collect data about your mobile device usage, and their practices are governed by their own policies.

Sharing Your Information

We do not share personal information collected in connection with the SMS Program with third parties, except in the following circumstances:

- When required by law, such as responding to a legal request, court order, or government agency request
- For services provided by trusted third-party vendors that act on our behalf and are contractually required to protect the information.

We do not share text-messaging opt-in data or message content with third parties for their own marketing or promotional purposes. We may use your mobile number, consistent with your preferences and applicable law, to send you our own service-related or marketing communications.

Third-Party Payment Processor

Payments made through our Sites or Services may be processed by third-party payment processors. Full payment-card numbers and card-verification codes are submitted directly to the processor and are handled in accordance with the processor’s privacy policy. CrossLink may receive and retain billing information, transaction records, payment status, and limited payment identifiers or tokens, but CrossLink does not store full payment-card numbers or card-verification codes. This section does not limit the separate collection and use of bank-account, refund-transfer, or bank-product information described elsewhere in this Privacy Policy.

For information about our current payment processors, contact CrossLink Support at support@crosslinktax.com.

Information Retention, Storage, and Transfer

Where Your Information Is Stored, Processed, and Retained

CrossLink stores and processes personal information in the United States. Personal information other than Tax Return Information may also be accessed or processed by service providers in other regions where permitted by law, and we use contractual, organizational, and technical safeguards to protect it in a manner consistent with this Privacy Policy. CrossLink does not transfer Tax Return Information outside the United States except as permitted by 26 U.S.C. §7216 and its regulations, including any required taxpayer consent and applicable masking or data-protection safeguards.

If you are located outside the United States, you consent—where permitted by law—to the transfer and processing of your information in the United States consistent with this Privacy Policy.

CrossLink retains personal information only as long as reasonably necessary for the disclosed purpose, subject to legal, regulatory, contractual, security, fraud-prevention, dispute-resolution, and litigation-hold requirements. Account, professional, commercial, and transaction information is retained for the duration of the business relationship and applicable recordkeeping or limitations periods. Government identifiers, financial information, and Tax Return Information are retained according to applicable tax, financial-services, legal, contractual, and fraud-prevention requirements. Internet, device, cookie, and approximate-geolocation data is retained according to security, analytics, advertising configuration, and service-provider retention settings and for shorter periods where reasonably feasible. Support records, call recordings, and chat transcripts are retained as needed to resolve the interaction, monitor quality, meet compliance obligations, or address disputes. Employment and applicant information is retained according to recruiting, employment, and legal requirements. Identity-verification information is retained only as long as necessary for verification, security, fraud prevention, or legal compliance. When information is no longer required, CrossLink securely deletes or de-identifies it using commercially reasonable methods. When CrossLink de-identifies personal information, it commits not to attempt to re-identify it except solely to test the effectiveness of de-identification where expressly permitted by applicable law.

Keeping Your Information Safe is Important to Us

The security of your personal information is extremely important to us. CrossLink uses administrative, technical, and physical safeguards designed to protect personal information against unauthorized access, use, or disclosure.

Our information-security program is designed to comply with applicable data-security requirements established by the Internal Revenue Service, the Gramm-Leach-Bliley Act, and the FTC Safeguards Rule and is informed by IRS Security Summit guidance. The program includes reasonable administrative, technical, and physical safeguards appropriate to the nature of the information, including access controls, secure transmission practices, incident-response processes, and personnel training.

For example, we:

- review and update security practices regularly
- apply encryption and secure transmission protocols
- enforce strict access controls and authentication requirements
- train personnel on privacy and security responsibilities; and
- monitor systems to detect and respond to potential threats

You also play an important role in protecting your information. Please maintain appropriate device and account security, including keeping your username and password confidential. However, no system or method of transmission is completely secure, and we cannot guarantee absolute security. If a security incident affects personal information CrossLink maintains, CrossLink will provide notifications consistent with applicable legal requirements. Where required, this includes notification to the Federal Trade Commission as soon as possible and no later than 30 days after discovery of a notification event involving the unencrypted customer information of 500 or more consumers under the FTC Safeguards Rule; notifications to the IRS and affected tax professionals or taxpayers consistent with applicable IRS breach-response requirements and guidance; and state-mandated notifications to attorneys general, regulators, and affected individuals within applicable timeframes.

We Do Not Knowingly Collect Information Directly from Children

Our Sites and Services are intended for use by adults and are not directed to children under 13. CrossLink does not knowingly collect personal information directly from children under 13 through child-directed interactions. This does not apply to information about minors—including Tax Return Information relating to dependents—that tax professionals or business customers lawfully provide for tax preparation, electronic filing, employment, or other permitted business purposes.

If we learn that we collected personal information directly from a child under 13 in a manner not permitted by law, we will take appropriate steps to delete or otherwise address that information, subject to applicable legal, regulatory, contractual, and record-retention obligations. If you believe we may have received such information, please contact CrossLink Support.

Because CrossLink's tax-preparation Services are used by professionals to prepare returns that may include minor dependents, Tax Return Information processed by CrossLink may include information about individuals under 13, such as a dependent's name, Social Security number, and date of birth. CrossLink handles all such information under 26 U.S.C. §7216 and applicable IRS, GLBA, and FTC Safeguards Rule requirements, regardless of the individual's age, and does not use such information for marketing, advertising, or any other purpose not expressly permitted by law.

Generative Artificial Intelligence, Machine Learning, and Automated Tools

CrossLink uses limited artificial intelligence (“AI”) and machine-learning tools to help process documents, support certain product features, and assist users by generating automated responses to tax-related questions. These tools may analyze information you provide and generate suggestions or informational outputs to help you use the Services more efficiently. They are designed to assist users and internal teams, not to replace human judgment. CrossLink does not use automated decisionmaking technology (“ADMT”), as defined by applicable California law, to make significant decisions about consumers without meaningful human involvement. Where a CrossLink system could influence such a decision, an appropriately qualified person reviews the relevant information and has authority to make or change the decision.

AI-generated responses are informational only and do not constitute tax, legal, or financial advice. They may not reflect the latest tax laws or guidance, and users remain responsible for reviewing all outputs and verifying the accuracy of any information used for tax preparation or filing.

CrossLink may use third-party AI providers acting on our behalf. We require those providers to process personal information only for authorized purposes and prohibit them from using it for generalized model training or unrelated purposes. When a provider receives Tax Return Information, CrossLink permits access only as authorized by 26 U.S.C. §7216 and its regulations, provides any required written notice regarding 26 U.S.C. §§6713 and 7216, and applies required contractual and security restrictions. CrossLink does not permit a third-party AI provider located outside the United States to receive Tax Return Information without obtaining the taxpayer consent and implementing the other safeguards required by law. These commitments apply to AI providers acting on CrossLink’s behalf. A third-party AI tool or service that a tax professional chooses to enable through an integration with a CrossLink product, including an AI-enabled tax-preparation offering, is provided by that third party, which processes information under its own terms and privacy policy. CrossLink transmits Tax Return Information to such a provider only at the tax professional’s direction and as permitted by 26 U.S.C. §7216 and its regulations, including written taxpayer consent where required.

Outputs generated through AI features that do not contain Tax Return Information may be logged and reviewed to improve CrossLink’s own products and Services, but they are not used to train generalized third-party models. If an AI feature processes Tax Return Information, any logging, review, use, or disclosure occurs only as permitted by 26 U.S.C. §7216 and its regulations or under a valid written taxpayer consent. Tax Return Information is not used to train generalized CrossLink or third-party models.

If our use of AI materially changes in a way that triggers additional notice, consent, or consumer rights under applicable law, we will provide the required notice and choices.

Cookies and Other Tracking Technologies

How We Use Cookies and Similar Technologies

We, and our vendors, use cookies and similar technologies to analyze trends, administer our Sites, track usage patterns across our Sites, products, services, and mobile applications, and gather demographic information about our user base. These technologies help us improve functionality, enhance performance, personalize your experience, and measure the effectiveness of our advertising.

We may receive reports based on the use of these technologies on both an individual and aggregated basis. Cookies may also be used to remember user settings and preferences. You can control the use of cookies through your browser settings; however, if you disable cookies, some portions of our Sites or services may not function properly.

As is true for most websites, we automatically collect and store certain information in log files. This may include Internet Protocol (IP) addresses, browser type, Internet service provider (ISP), referring and exit pages, operating system, date/time stamps, and clickstream data. We may combine this automatically collected information with other data we collect to improve our products, services, and advertising effectiveness.

We also work with third parties that use cookies and similar technologies to provide services on our behalf, deliver relevant advertising, or help us analyze site usage. These third parties may include analytics providers such as Google Analytics. To disable or reject third-party technologies, please refer to the applicable third party’s privacy policy or cookie settings.

How to Manage Your Cookies

You can set your browser to alert you when cookies are sent or to block certain or all cookies. Use your browser’s settings or help menu to learn how to manage cookies. Blocking cookies may affect the availability or functionality of portions of our Sites or Services.

Please Note: Some sites and applications may also use local storage technologies (such as HTML5 local storage) that are not always controlled by standard cookie settings. Restricting these technologies may affect certain website features.

Most mobile devices also allow you to control how other identifiers and technologies are set and used. Please review your mobile operating system's support documentation for details.

Additional Choices

You can learn more about opting out of tracking through advertising and analytics cookies at the following resources:

- Digital Advertising Alliance (DAA): [WebChoices Opt-Out Tool](#)
- Network Advertising Initiative (NAI): [Opt-Out Page](#)
- TrustArc: [Preferences Manager](#)

Please note that opting out of cookies or targeted advertising does not eliminate all advertisements—you will still receive ads, but they may be less relevant to your interests. Opting out of certain technologies may also affect functionality or personalization within CrossLink products and services.

Your Information Rights and Choices

The easiest ways to exercise your privacy rights are: (1) using the “Do Not Sell or Share My Personal Information” link, (2) managing settings in your CrossLink account (where available), or (3) contacting us at support@crosslinktax.com.

We offer choices regarding how personal information is collected, used, and shared. Depending on applicable law and subject to applicable exceptions, you may have rights to access, correct, delete, or obtain a copy of personal information and to opt out of certain sales, sharing, targeted advertising, or profiling.

If you wish to exercise any of these rights, please follow the instructions below or contact us using the information provided in the “How to Contact Us” section. If you have a registered account, you may also sign in to manage or update your information directly.

Access, Correction, or Deletion of Personal Information

You may request to access the personal information we maintain about you, correct inaccuracies, or have your information deleted. Upon receipt of a verifiable request, CrossLink will provide the requested data or confirm deletion in accordance with applicable law and our retention policies.

Opt-Out of the Sale or Sharing of Personal Information

You may opt out of the sale or sharing of your personal information, including processing for targeted advertising, by using the “Do Not Sell or Share My Personal Information” link in the footer of each CrossLink Site. CrossLink does not require a verifiable consumer request or identity verification for an opt-out request and will request only information reasonably necessary to process the request.

Opt-Out of Technologies, Including Cookies and Tracking Technologies

You may choose to opt out of certain technologies used on our Sites, including those used for analytics or online advertising. Please note that opting out may limit or disable certain functionality of our Sites or services. For more information, see the “Cookies and Other Tracking Technologies” section above. Even if you opt out, you may still see non-personalized advertising.

Opt-Out of Email and Text Communications

You may unsubscribe from our general marketing emails, newsletters, or text messages by following the unsubscribe instructions in those communications or by contacting us directly. Even if you opt out of marketing, we may continue to send important service or transactional communications related to your account or use of our services through legally permitted channels. We will not send text messages covered by your revocation of SMS consent unless you later provide the required consent or applicable law permits the message without consent.

Appeal Rights for Denials

If we deny your request, you may appeal the decision by emailing support@crosslinktax.com with the subject line “Privacy Appeal.” We will review your appeal and respond within the time frame required by applicable law.

Verification

To protect your privacy, CrossLink may verify requests to know, access, correct, or delete personal information by matching information you provide with existing records or through other lawful methods. CrossLink does not require identity verification for a request to opt out of sale, sharing, or targeted advertising. If CrossLink cannot verify a request for which verification is legally permitted or required, we will explain why and may deny that request as permitted by law.

Non-Discrimination

We will not discriminate against you for exercising privacy rights available under applicable law. Certain personal information is necessary to provide the Services, and deletion may limit or prevent our ability to continue providing some or all Services.

California Privacy Rights (CCPA/CPRA)

This section describes the rights of California residents under the California Consumer Privacy Act of 2018, as amended by the California Privacy Rights Act of 2020 (together, the “CCPA”).

Opt-Out and Sales/Sharing Notice

You may opt out of the sale or sharing of your personal information by using the “Do Not Sell or Share My Personal Information” link on our Sites or by contacting us. CrossLink also honors recognized opt-out preference signals, including Global Privacy Control, as described below. CrossLink does not require identity verification for an opt-out request.

CrossLink does not sell personal information for monetary consideration. During the 12 months preceding the Effective Date, CrossLink sold or shared, as those terms are defined by the CCPA, Identifiers and Internet or Other Electronic Network Activity—including online identifiers, cookie data, device data, browsing activity, and usage activity—with advertising networks, data analytics providers, operating systems and platforms, and social networks for cross-context behavioral advertising, personalization, and advertising measurement. CrossLink does not sell or share Tax Return Information or sensitive personal information for these purposes.

Your Rights Under the CCPA

California residents have the following rights:

- **Right to Know and Access:** You may request the categories and specific pieces of personal information we have collected about you, the sources and purposes of that information, the categories of third parties to whom it was disclosed, sold, or shared, and related details for the period required by law, including information beyond the preceding 12 months where required.
- **Right to Delete:** You may request that we delete personal information we hold about you, subject to legal and operational exceptions, such as completing a transaction, detecting security incidents, maintaining records, or complying with law.
- **Right to Correct:** You may request that we correct inaccurate personal information. If you have an account, you may also edit certain information directly.
- **Right to Opt Out of Sale or Sharing:** You may direct us not to sell or share your personal information, including sharing for cross-context behavioral advertising.
- **Right to Limit Use of Sensitive Personal Information:** CrossLink uses and discloses sensitive personal information only for purposes permitted by 11 California Code of Regulations §7027(m), and only as reasonably necessary and proportionate for those purposes. Accordingly, CrossLink is not currently required to provide a separate mechanism for requests to limit. If our practices change so that this right applies, we will provide the required notice and request methods before beginning the affected use or disclosure.
- **Right to Non-Discrimination:** We will not deny Services, charge different prices, or provide a different level or quality of Service because you exercised a CCPA right.
- **Financial Incentives:** CrossLink does not currently offer a program that qualifies as a financial incentive under the CCPA. If we introduce one, we will provide the required notice and obtain opt-in consent before enrollment.

Categories of Personal Information Collected

During the 12 months preceding the Effective Date, CrossLink collected the categories of personal information listed below, as defined by the CCPA, from the sources and for the purposes described in this Privacy Policy.

Category	Examples / Sources	Retention Criteria
Identifiers	Name, address, email, phone number, IP address, account credentials, Social Security number, or driver’s license number—provided directly, by business customers or partners, or generated through interactions with our Sites and Services.	Business relationship; account administration; security; applicable recordkeeping and limitations periods.
Protected Classification Characteristics	Age, sex or gender, and other protected characteristics when provided in tax, employment, account, or support contexts.	Relevant tax, employment, support, legal, or compliance period.
Commercial Information	Purchase, licensing, service-use, and transaction information—provided by you or generated through transactions and account activity.	Transaction and relationship period; accounting, tax, warranty, dispute, and legal requirements.
Internet or Other Electronic Network Activity	Browsing history, search information, device information, cookie data, and interactions with our Sites or Services—collected automatically through cookies, logs, and similar technologies.	Security, analytics, advertising configuration, and vendor settings; shorter periods where feasible.

Category	Examples / Sources	Retention Criteria
Geolocation Data	Approximate location derived automatically from an IP address; precise location collected only when a feature is enabled with your permission.	Security, fraud-prevention, feature operation, consent, and legal requirements.
Professional or Employment Information	ERO details, PTIN, firm information, employment records, and job-application information—provided directly or by an authorized organization.	Customer relationship or recruiting/employment period; applicable legal and recordkeeping requirements.
Inferences	Profiles, preferences, usage patterns, or product interests derived from other collected information.	While reasonably necessary for the associated service, personalization, analytics, or advertising purpose.
Personal Information Described in Cal. Civ. Code §1798.80(e)	Contact information, financial information, and other information included within the statutory category—provided directly or through transactions and Services.	Underlying transaction, service, tax, financial, security, and legal requirements.
Sensitive Personal Information	Government identifiers, account log-in credentials, financial-account information, verification documents, precise geolocation when enabled, and other sensitive data described by applicable law.	Only as necessary for identity verification, account access, financial services, fraud prevention, tax processing, or law.
Sensory Data	Audio recordings of customer-support or service calls and similar interactions.	Support resolution, quality monitoring, compliance, dispute, and litigation-hold requirements.

Categories of Personal Information Sold or Shared

During the 12 months preceding the Effective Date, CrossLink sold or shared Identifiers and Internet or Other Electronic Network Activity—including online identifiers, cookie data, device data, browsing activity, and usage activity—with advertising networks, data analytics providers, operating systems and platforms, and social networks for cross-context behavioral advertising, personalization, and advertising measurement. CrossLink did not sell or share Tax Return Information or sensitive personal information for these purposes.

CrossLink does not have actual knowledge that it sells or shares the personal information of consumers under 16. CrossLink’s current uses and disclosures of sensitive personal information, and the circumstances in which a right-to-limit mechanism would be provided, are described under “Right to Limit Use of Sensitive Personal Information” above.

Categories of Personal Information Disclosed for a Business Purpose

During the preceding 12 months, we disclosed categories of personal information described above to service providers, contractors, affiliates, financial-service partners, government authorities, and other recipients for the business purposes described in this Privacy Policy, including:

- **Security and Integrity:** Detecting, preventing, and investigating fraud or security incidents.
- **Service Improvement:** Identifying bugs, repairing errors, and improving functionality.
- **Service Provision:** Providing customer support, processing transactions, and fulfilling your requests.
- **Legal and Compliance:** Responding to lawful requests from regulators or law enforcement.
- **Marketing and Advertising:** Conducting marketing activities and communications on our behalf, as permitted by law.

How to Exercise Your Rights

You or your authorized agent may submit a privacy-rights request using the methods below. An authorized agent may use the same request methods. CrossLink may require the agent to provide signed permission from the consumer and may verify the agent’s identity and authority as permitted by law. CrossLink may also ask the consumer to confirm the agent’s authority, except where prohibited for an opt-out request.

- Using the “Do Not Sell or Share My Personal Information” link on our Sites for sale- or sharing-opt-out requests;
- Emailing legal@crosslinktax.com or support@crosslinktax.com for access, correction, deletion, appeal, or other privacy requests; or
- Calling us toll-free at (800) 345-4337.

CrossLink may verify requests to know, access, correct, or delete using information already in our records or other lawful methods and will respond within the timeframe required by California law. CrossLink does not require a verifiable consumer request or identity verification for a request to opt out of sale or sharing and will request only information reasonably necessary to process the opt-out or confirm an authorized agent’s authority.

U.S. State Residents Outside California

This section supplements the information above for residents of U.S. states with comprehensive consumer privacy laws. Depending on your state of residence and subject to applicable exceptions, you may have rights to access, correct, delete, or obtain a portable copy of personal data; opt out of targeted advertising, the sale or sharing of personal data, or certain profiling; and appeal a denial of a request. State definitions, coverage thresholds, exemptions, and available rights vary.

Privacy rights may not apply to information or entities exempt under applicable law, including certain information subject to the Gramm-Leach-Bliley Act, Tax Return Information governed by 26 U.S.C. §7216, and other exempt employment, business-to-business, health, credit, or regulated information, as applicable. CrossLink will honor the rights required by applicable law. You may exercise those rights using the methods described in “Your Information Rights and Choices.”

Rhode Island Notice

CrossLink processes Identifiers and Internet or Other Electronic Network Activity for targeted advertising as described in this Privacy Policy. As of the Effective Date, third parties to whom CrossLink may disclose such information for targeted advertising and measurement, and whose receipt may constitute a sale under Rhode Island law, include Google, LinkedIn, Simpli.fi, and RealLeads. CrossLink does not sell Tax Return Information or sensitive personal information. CrossLink will update this disclosure when the applicable partners materially change.

Universal Opt-Out Mechanisms

Where required by applicable state privacy law, CrossLink treats a recognized opt-out preference signal, including Global Privacy Control, as a request to opt out of sale, sharing, and targeted advertising for the browser or device sending the signal and any associated pseudonymous profile. No separate form is required for that browser or device. If CrossLink knows that the signal is associated with a CrossLink account, CrossLink will also apply the request to that account as required by law. To extend a request to offline or account-linked data that CrossLink cannot associate with the signal, you may use the “Do Not Sell or Share My Personal Information” link or contact us.

CrossLink will continue to monitor applicable state privacy laws and update this Privacy Policy as appropriate. Residents may exercise applicable rights by following the procedures described above or by contacting support@crosslinktax.com.

Accessibility

We are dedicated to ensuring our Privacy Policy is accessible to individuals with disabilities. If you use assistive technology (such as a Braille reader, screen reader, or text enlargement programs) and encounter any issues accessing the Privacy Policy, please contact us at support@crosslinktax.com. Include a description of your accessibility challenge, your preferred format for the Privacy Policy, and your contact information so we can assist you effectively.

Changes to This Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in our practices, technologies, legal requirements, or other factors. The Effective Date or Last Updated date at the top of the policy indicates when it was most recently revised. Changes become effective when the revised Privacy Policy is posted on our Sites or on any later date stated in the notice. If we make a material change to how we use or disclose personal information we have already collected, we will provide notice before the change takes effect and obtain consent where required by law. We encourage you to review this Privacy Policy periodically to remain informed about how we handle personal information.

How to Contact Us

If you have questions or comments about this Privacy Policy or wish to exercise a privacy right, please contact us using one of the methods below.

Email: legal@crosslinktax.com or support@crosslinktax.com. Privacy-rights requests sent to either address will be routed to the CrossLink Legal Department for handling.

Telephone: (800) 345-4337.

Mail: CrossLink Professional Tax Solutions, LLC, Attention: Legal Department, 2000 N. Alafaya Trail, Suite 600, Orlando, FL 32826.

If you believe your privacy concern has not been adequately addressed, you are entitled to escalate such grievances to the Federal Trade Commission, state attorney general, or the appropriate regulatory authority.