

CCH Small Firm Services

Privacy Statement

Revised: March 31, 2016

Universal Tax Systems, Inc. d/b/a CCH Small Firm Services (“CCH SFS” or “we”) has developed this privacy statement for you, the visitor, to demonstrate its commitment to privacy on the Internet. This privacy statement describes the types of information we may collect from you or that you may provide when you visit the following websites: cchsfs.com, support.cchsfs.com, support.taxwise.com, support.atxinc.com and portalsafe.com (collectively, our “Web Sites”) and our practices for collecting, using, maintaining, protecting and disclosing that information.

Please read this privacy statement carefully to understand our policies and practices regarding your information and how we will treat it. If you do not agree with our policies and practices, your choice is not to use our Websites. By accessing or using our Websites, you agree to this privacy statement. This privacy statement may change from time to time. Your continued use of our Websites after we make changes is deemed to be acceptance of those changes, so please check the policy periodically for updates.

CCH SFS wants to demonstrate its commitment to your privacy. This privacy statement discloses the privacy practices for CCH SFS and our Web Sites, including:

1. What personally identifiable information of yours or third party personal identification is collected from you through our Web Sites;
2. How the information is used;
3. With whom the information may be shared;
4. What choices are available to you regarding collection, use and distribution of the information;
5. The kind of security procedures that are in place to protect against the loss, misuse or alteration of information under CCH SFS’ control; and
6. How you can correct any inaccuracies in the information.

This privacy statement does not apply to information collected by:

- us offline or through any other means, including on any other website operated by CCH SFS or any third party (including our affiliates and subsidiaries);
- or any third party (including our affiliates and subsidiaries), including through any application or content (including advertising) that may link to or be accessible from our Websites.

You also may provide information to be published or displayed (hereinafter, “posted”) on public areas of the Website (such as, but not limited to, the support sites and client message boards that may be accessed via such support sites), or transmitted to other users of the Website or third parties (collectively, “user contributions”). Your user contributions are posted on and transmitted to others at your own risk. Although we limit access to certain pages, please be aware that no security measures are perfect or

impenetrable. Additionally, we cannot control the actions of other users of our Websites with whom you may choose to share your user contributions. Therefore, we cannot and do not guarantee that your user contributions will not be viewed by unauthorized persons.

Children Under the Age of 13

Our Websites are not intended for children under 13 years of age. We do not knowingly collect personal information from children under 13. If you are under 13, do not use or provide any information on our Websites or on or through any of its features/register on our Websites, make any purchases through our Websites, use any of the interactive or public comment features of our Websites or provide any information about yourself to us, including your name, address, telephone number, email address or any screen name or user name you may use. If we learn we have collected or received personal information from a child under 13 without verification of parental consent, we will delete that information.

Collection of Personal Information from Site Visitors

CCH SFS may collect and/or track (1) the home server domain names, email addresses, type of client computer, and type of Web browser of visitors to our Website, (2) the e-mail addresses of visitors that communicate with CCH SFS via e-mail, (3) information knowingly provided by the visitor in online forms, registration forms, surveys, and contest entries (including demographic and personal profile data), and (4) aggregate and user-specific information on which pages visitors access.

Use of Personal Information Collected

Personal data collected by CCH SFS, on our Websites, may be used by CCH SFS companies for editorial and feedback purposes, for marketing and promotional purposes, for a statistical analysis of users' behavior, for product development, for content improvement, to inform advertisers as to how many visitors have seen or clicked on their advertisements, or to customize the content and layout of our Websites. Aggregate data on visitors' home servers may be used for internal purposes or provided to third parties, such as advertisers. Individually identifying information, such as names, postal and email addresses, phone numbers, and other personal information which visitors voluntarily provide to CCH SFS may be added to CCH SFS databases and used for future calls and mailings regarding site updates, new products and services, upcoming events, and status of orders placed online.

CCH sometimes collects non-identifiable information from visits to our Websites to help us provide better customer service. For example, we keep track of the domains from which people visit, and we also measure visitor activity on CCH websites, but we do so in ways that keep the information non-identifiable. This information is sometimes known as "clickstream data." CCH SFS or others on CCH SFS behalf may use this data to analyze trends and statistics in order to help us provide better customer service.

Also, when we collect personal data from you in a transaction, we may extract some information about that transaction in a non-identifiable format and combine it with other non-identifiable information such as clickstream data. This information is used and analyzed only at an aggregate level to help us understand trends and patterns. This information is not reviewed at an individual level.

In the event you desire to no longer receive communications regarding product information from CCH SFS, you may notify CCH SFS via e-mail (marketing@cchsfs.com), by unsubscribing at cchsfs.com/unsubscribe, or by mail at CCH SFS Marketing Dept, 225 Chastain Meadows Court NW, Suite 200, Kennesaw, GA 30144 and request removal from product information mailings by CCH SFS.

Registration

In order to access advanced support options online at our customer support site, a user must first complete the user registration form. During this login process a user is required to give his/her User Name, Client ID, EFIN and/or registration code. This information is used to identify the user before he/she accesses the advanced support options. The user is required to provide this information when accessing advanced support options so that we can provide a more personalized support experience.

Ordering

Our product order forms require you to disclose personal information. Here a user must provide contact information (such as name and shipping address) and financial information (such as credit card number and expiration date). This information is used for billing purposes and to fulfill the customers' order(s). If we experience difficulty while processing an order, the contact information is used to contact the user. CCH SFS does not make public, sell or distribute customers' credit card information. Our Websites use industry-standard encryption to safeguard credit card transactions.

Cookies

Cookies can provide our users with a more personalized and convenient visit to our Web Sites. A cookie is a small text file that is placed on a user's hard drive by a web browser, at the request of a web page server. Cookies cannot be used to run programs, deliver viruses to your computer, or extract personal information from your computer. The cookies we assign to you are unique, and can only be read by our web servers. By setting a cookie on our site, the user may not have to reenter their username multiple times, thereby saving time while on our site. Cookies may also enable us to track and target the interests of our users in order to enhance the experience customers have while on our sites.

CCH SFS may place Internet "cookies" on visitors' hard drives. Internet cookies may save data about individual visitors, such as the visitor's name, password, user-name, shopping cart, screen preferences, the pages of a site viewed by the visitor, and the advertisements viewed or clicked by the visitor. When the visitor revisits a Website, the Website may recognize the visitor by the Internet cookie and customize the visitor's experience accordingly. Visitors may not decline or disable Internet cookies while visiting CCH SFS Web sites.

In the event visitors delete or disable Internet cookies, data about the individual visitor will be erased which may result in the sites not functioning properly or when the visitor returns to our Websites (in a new session), the Websites will not recognize the visitor.

Log Files

We use Internet Protocol ("IP") addresses to analyze trends, administer our site, track users' movement, and gather broad demographic information for aggregate use. IP addresses of visitors to our public Web Sites are not linked to personally identifiable information. CCH SFS may, in its sole discretion, record the

IP address of the computer from which an electronically filed return originated as part of our ongoing effort to detect fraudulent information being transmitted via the Internet.

Sharing

CCH SFS may share information with its parent and/or sister companies for internal technical and administrative purposes.

From time to time, CCH SFS may outsource the performance of certain administrative functions (e.g., processing credit card transactions, mailing CCH SFS marketing or account information, performing some accounting services). In these situations the third-party service providers do not retain, share, store or use personally identifiable information for any secondary purposes.

CCH SFS partners with third party companies that provide specific services such as merchant services, tech support and bank product processing. When you sign up for services or products of a third party with whom CCH SFS conducts business, CCH SFS will share your name or contact information to the extent necessary for the third party to provide such products or services. These parties are not granted permission by CCH SFS to use personally identifiable information for any purpose other than providing these services; however, such third parties may have a different privacy policy.

Except as set forth in this privacy statement, CCH SFS does not sell, rent, share or intentionally make publicly available any individually identifying information. CCH SFS may disclose to third parties only information in aggregate form, that is publicly available, and/or that is knowingly and voluntarily disclosed by visitors. If there are advertisements on CCH SFS's website, the advertiser(s) may be electronically notified when visitors view or click on its advertisements.

Except as set forth in this privacy statement, personally identifiable information is not otherwise released by CCH SFS to outside parties unless required by law or legal process (for example, subpoena or court order). CCH SFS reserves the right to make exceptions to this policy in exceptional circumstances (such as suspected illegal activity) on a case by case basis and at the sole discretion of CCH SFS. CCH SFS abides by applicable laws and regulations governing the disclosure of information to governmental agencies.

Links

Our Web Sites may contain links to other web sites. Please be aware that CCH SFS is not responsible for the privacy practices of such other sites. We encourage our users to be aware when they leave our site and to read the privacy statements of each and every web site that collects personally identifiable information. This privacy statement applies solely to information collected by the Web Sites of CCH SFS and no other sites.

Newsletter

We provide users the opportunity to receive newsletters via e-mail. If a user wishes to subscribe to our newsletter, we ask for contact information such as name and e-mail address. Users who no longer wish to receive our newsletter may opt-out of receiving these communications by using the unsubscribe option in the newsletter email or by contacting CCH SFS Marketing at marketing@cchsfs.com or by visiting cchsfs.com/unsubscribe.

Security

CCH SFS takes reasonable, industry standard precautions to protect customer information.

When customers submit sensitive information to CCH SFS via our Websites, their information is protected while both online and offline through the following methods:

Access:

- All access to customer information is restricted.
- Only employees who require access to perform their job function are granted access to personally identifiable information.
- Employee access to sensitive information is logged.

Transmission:

- When SFS Websites accept sensitive information online, that information is protected in transit with industry-standard encryption.

Storage:

- Storage of records containing personally identifiable information are maintained in a secure environment.
- Systems that store personally identifiable information are encrypted at rest.

Training:

- At least annually, all employees are required to be trained on current security and privacy practices through corporate security training.

Site and Service Updates

From time to time we may send the user transactional notifications regarding customer service updates. Members are not able to unsubscribe from customer service announcements, which contain important information about the service. We communicate with the user to provide requested services and in regards to issues relating to their account via e-mail or phone. It is the user's responsibility to ensure that his/her contact information is current and correct for various purposes.

Your California Privacy Rights

California Civil Code Section § 1798.83 permits users of our Websites that are California residents to request certain information regarding our disclosure of personal information to third parties for their direct marketing purposes. To make such a request, please send an email to marketing@cchsfs.com or write us at CCH SFS Marketing Dept, 225 Chastain Meadows Court NW, Suite 200, Kennesaw, GA 30144.

Changes to Our Privacy Statement

This privacy statement may change from time to time. It is our policy to post any changes we make to our privacy policy on the website where this policy statement is regularly located (see <https://www.cchsfs.com/legal/>). The date this privacy statement was last revised is identified at the top

of the page. Your continued use of our Websites after we make changes is deemed to be acceptance of those changes, so please check the policy periodically for updates.

Customer Responsibilities

While CCH SFS provides security measures to protect the privacy and confidentiality of the user's information, the tax preparer customer is responsible for protecting the confidentiality of the individual EFIN and registration code assigned to his/her office, and any UserIDs and passwords created within the software. The customer is also responsible for protecting the confidentiality of all tax return information originating from his/her account, and more particularly such information that is accessed through the use of such EFIN, registration code, UserIDs and/or passwords.

Access to and Ability to Correct Personal Information

We strive to maintain the accuracy of the personal information collected through our Websites. If we hold any information about you which is incorrect or if there are any changes to your details please let us know by so that we can keep our records accurate and up to date. You should be aware, however, that it is not always possible to completely remove or modify information in our databases. We will retain your personal information for the duration of our business relationship and afterwards for as long as is necessary and relevant for our legitimate business purposes or to comply with applicable laws and regulation. Where we no longer need your personal information we will dispose of it in a secure manner (without notifying with you).

Contact Information

If you have any questions, please contact our marketing department at: CCH SFS Marketing Dept, 225 Chastain Meadows Court NW, Suite 200, Kennesaw, GA 30144, by e-mail at marketing@cchsfs.com or by calling 1-800-375-9542.