

**January 2008**

## **Privacy Policy**

### **For Quick and Easy Inc. tax services provided in-store and on-line**

Protecting your privacy is important to Quick and Easy Taxes. This privacy policy explains the types of personal information we may collect from and about you, as well as how we may disclose and protect that information.

#### **Who This Policy Covers**

This policy applies to personal information we collect in connection with the provision of online and in-store tax preparation services to customers.

#### **Information We May Collect**

- We collect certain personal information so that we may prepare your tax return. This information typically includes, for example, your name, address and certain other data such as your social security number, income and deductions data, and other personal information about you and your dependents that we need to prepare your tax return. This information may also include system information, such as your operating system version, internet protocol (IP) address. The Internal Revenue Service (“IRS”) requires us to collect certain system information in connection with electronic filing of tax returns.
- We may collect personal information in connection with transactions other than tax return preparation that you complete or propose to complete with us, our affiliates or certain nonaffiliated third parties. This personal information may include, for example, your name, address and certain other “nonpublic personal information” such as checking, debit and credit account numbers, balances and payment history, income and assets.
- We may collect this personal information about you from you, the IRS, our franchisees, our affiliates, and certain non-affiliated third parties such as credit reporting agencies.
- We may collect personal information about you when you inquire about services or request information from us. This personal information may include, for example, your name, telephone number, mailing address and e-mail address. We may also collect similar information when your software program interacts with our Site or servers. This information may include, for example, your name, telephone number, mailing address and e-mail address, system information and configuration, account number and demographic information.
- When you use our office locator service, we may collect data such as address or zip code information so that we can better assess the level of interest in our services in a particular area, and the effectiveness of the locator tool in helping clients use our services.

- We collect other information about you and your use of our services through the use of various technologies to help manage our Site, to save our customers time, and to understand more about the way our customers interact with us. These technologies include cookies, clear GIFs, and log files. Much of this information is not personally identifiable, but some of it can be combined with other information to create personally identifiable information.
- The IRS requires Quick and Easy Taxes to retain filed tax returns for a period of at least three years. It is Quick and Easy Taxes' policy that if you start, but do not complete a tax return in our online tax programs, we will generally keep the tax return information you provide until the end of the tax season.

### **How We May Disclose Information About You**

Quick and Easy Taxes' disclosure of personal information about you is controlled by various laws, regulations and other legal requirements, as well as Quick and Easy Taxes' policies. We may disclose personal information that we collect, subject to the terms of this privacy policy and consistent with applicable law. The examples contained in this notice are illustrations; they are not intended to be exhaustive.

- Where permitted or required by law, we may disclose personal information about you for our normal business purposes. For example, this may include disclosures to the Internal Revenue Service (IRS), and for certain other lawful purposes where this disclosure is permitted by law (such as the processing of your tax return).
- Where permitted by applicable law, we may disclose your personal information to service providers who perform business functions on our behalf (for services such as check printing, data processing and analysis, contest supervision, and direct mail or e-mail production).
- In certain situations involving personal information collected for tax return preparation, we are required to have your consent before we disclose this information to affiliates or other nonaffiliated third parties. For example, if you have provided consent, we may disclose personal information about you to Quick and Easy Taxes' affiliates engaged in offering banking, investment, credit cards or consumer loans, insurance or other non-tax financial services in order to provide you with service enhancements and product opportunities that we believe may interest you.
- We do not share your personal information with non-affiliated third parties for marketing purposes except as permitted by applicable law or with your consent. We do not sell or rent your personal information to third party direct marketers.
- Where permitted by law, we may disclose your personal information to financial institutions with which we have joint marketing agreements. We require all joint marketers to have written contracts with us that specify appropriate use of your personal information, require them to safeguard your personal information, and prohibit them from making unauthorized or unlawful use of your personal information. If a state law (or other law) requires us to give you the right to opt-out prior to any disclosure of your personal information for joint marketing, we will not disclose your

personal information for such purposes without providing such opt-out or obtaining your consent to such disclosure.

We may disclose your personal information to affiliates or non-affiliated third parties (including government entities) when we have a good faith belief that such disclosure is required or permitted by law. This may occur, for example, in connection with a court order, legal process, or other judicial, administrative or investigative proceeding, or other situations where the provision of certain information is required or permitted by law.

### **How We Protect Your Information**

Quick and Easy Taxes maintains physical, electronic and administrative policies and procedures designed to restrict access to your personal information. These include programs and specifications for physical security and records retention and disposal; 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 physical and electronic forms.

When you enter sensitive information in our online tax programs, we encrypt that information using secure socket layer (SSL) technology. When you use our online tax preparation tools, remember to sign out of your account and close your browser window when you have finished your work. This is to ensure that others cannot access your account by using your computer when you are away from it.

### **Updates or Changes to Your Personal Information.**

If you believe information we have collected from you is inaccurate, you may update the information by signing into your online account or contact us

<http://www.quickandeasytaxes.com/contact.php>. Quick and Easy Taxes cannot change information in your filed tax return. You must file an amended tax return to make changes to a filed tax return.

### **Third Party Products and Services and Links to Third Party Sites**

The Quick and Easy Taxes Site may contain links to third party Web sites or offers for services from third parties. Examples may include offers for refund anticipation loans or other loans offered through a third party bank, and tax payment options. For any such third party products or services, you should carefully read the privacy policies of the third parties providing such products or services. This privacy policy applies solely to services provided by Quick and Easy Taxes, and not to products or services offered by a third party.

### **Children Under Age 13**

Because of the financial nature of the services we provide, we do not market our Site to children under the age of 13.

### **How You May Opt-Out of Information Sharing or Otherwise Control Use of Your Information.**

We give you choice and control over the use of your personal information. We provide you the opportunity to opt-out of receiving communications from us and companies with which we do business. We also provide you with the opportunity to opt-out of certain information sharing. You may not opt-out of the sharing of information that does not identify you personally. You may limit marketing communications from Quick and Easy Taxes as follows. Quick and Easy Taxes may use information you provide (subject to your consent, where required) to communicate with you about products and services available through Quick and Easy Taxes or third parties. If at any time you wish to limit your receipt of such marketing communications you may click here

<http://www.quickandeasytaxes.com/contact.php>. At your request and subject to the limitations below, we will make reasonable efforts to limit all such marketing communications to you. In addition, when we send you marketing emails, we will generally include in each email a method to enable you to indicate your preference not to receive further emails.

**Contact for Questions or Concerns.**

If you have questions or concerns regarding this privacy policy, contact Quick and Easy Taxes <http://www.quickandeasytaxes.com/contact.php>.

Policy effective date January 2008