

# PRIVACY POLICY

## CROSSLINK FAMILY OF COMPANIES

**Important Information:** We have made important updates to our Privacy Policy, effective **January 1, 2026** (the “Effective Date”). By using our Sites or services on or after the Effective Date, you acknowledge and agree to these updated terms.

This Privacy Policy describes how the CrossLink Family of Companies—including CrossLink Professional Tax Solutions, LLC, CrossLink Tax Tech Solutions, LLC, Audit Allies, LLC, and their affiliates and subsidiaries (“CrossLink,” “we,” “us,” or “our”)—collects, uses, shares, and protects your information. It applies to information collected through your interactions with our websites and applications (including [crosslinktax.com](https://crosslinktax.com), [crosslinktaxtech.com](https://crosslinktaxtech.com), and [auditallies.com](https://auditallies.com)), and to products and services that reference this Privacy Policy. Some offerings may include additional privacy notices describing specific data practices; please review those notices as applicable.

### 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 meet applicable IRS rules, the FTC Safeguards Rule, IRS Security Summit requirements, and the Gramm-Leach-Bliley Act (GLBA). We collect and store personal information as appropriate 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
<b>Identifiers</b>	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
<b>Government Identifiers</b>	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
<b>Financial Information</b>	Bank account details, payment information, refund transfer data	Billing, bank product services, processing transactions	Provided by you or by integrated bank-product partners
<b>Professional Information</b>	ERO details, PTIN, firm information, employment data	Enrollment, compliance, tax-office operations	Provided directly by you
<b>Commercial Information</b>	Purchases, licenses, service-use data	Account management, product fulfillment, analytics	From your transactions or profile activity
<b>Internet / Technical Data</b>	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
<b>Geolocation Data</b>	Approximate location based on IP address	Security, fraud detection, compliance requirements	Automatically collected via your browser or device
<b>Customer Support Data</b>	Call recordings, chat transcripts, support tickets	Customer service, troubleshooting, compliance	Provided by you during interactions with CrossLink
<b>Tax Return Information</b> (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
<b>Inferences</b>	Preferences, usage patterns, product interests	Service improvement, 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;
- performing internal analytics to improve 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 consistent with this Privacy Policy.

**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 under one or more lawful bases recognized by U.S. state privacy laws: (a) performance of a contract; (b) compliance with legal obligations; (c) legitimate business interests, such as service improvement or fraud prevention; and (d) consent, where required.

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

We may also process information considered *Sensitive Personal Information* under state law for these same purposes and, where required, only with your consent. Sensitive Personal Information may include government-issued identification numbers, login credentials, and limited biometric identifiers (if provided or required for identity verification). Enhanced rights apply to these categories, including opt-in consent, access, and detailed notification for collection, storage, or sharing. CrossLink uses Sensitive Personal Information only for limited purposes such as account security, authentication, fraud prevention, and legal compliance. CrossLink does not use Sensitive Personal Information—including government IDs or login credentials—for cross-context behavioral advertising or for profiling that produces legal or similarly significant effects. Passwords and similar authentication credentials are never used for marketing purposes and are stored using industry-standard security measures.

## How We Share Your Personal Information.

CrossLink shares personal information only as permitted by applicable law, including IRS §7216, GLBA, the FTC Safeguards Rule, and state privacy laws. We do not sell personal information. We do not use or share Tax Return

Information for marketing, advertising, or analytics without a valid written taxpayer consent under Treas. Reg. §301.7216-3.

CrossLink does not sell personal information for monetary value and does not treat your personal information as “sold” except as that term is defined under applicable privacy laws. We may share limited personal information for cross-context behavioral advertising as permitted by law, and you may opt out of such sharing at any time using the “Do Not Sell or Share My Personal Information” link.

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

#### **How We Share Your Personal Information — Summary Chart**

<b>Sharing Category</b>	<b>What We Share</b>	<b>Recipients</b>	<b>Tax Return Information Shared?</b>	<b>Legal / Compliance Notes</b>
<b>At Your Direction</b>	Personal information you authorize us to share	Third-party apps, integrations, services	<b>No</b>	Shared only when you enable or request a connection
<b>At the Direction of Your Tax Professional</b>	Tax Return Information required for filing or approved disclosures	IRS, state tax authorities, third parties authorized by written §7216 consent	<b>Yes — only as directed and permitted by law</b>	Must comply with §7216 and Treas. Reg. §301.7216-2; CrossLink does not determine how Tax Return Information is shared except as permitted under 26 U.S.C. §7216 and its regulations.
<b>Legal, Regulatory &amp; Security Requirements</b>	Personal information; TRI only within legal exceptions	Courts, IRS, state agencies, law enforcement	<b>Yes — limited by §7216 exceptions</b>	Only when required by law or necessary to detect/prevent fraud or security threats under permitted exceptions
<b>Bank-Product &amp; Financial Service Partners</b>	Information needed for refund transfers, loans, or financial products	Bank-product providers, financial institutions, underwriters	<b>Only with valid §7216 consent or statutory permission</b>	Used solely to deliver the financial product requested
<b>Credit, Collections &amp; Fraud-Mitigation Partners</b>	Account, payment, and verification information	Credit bureaus, collection agencies, fraud-prevention partners	<b>TRI only if legally permitted or consented</b>	May include late-payment reporting; TRI not used unless authorized
<b>Corporate Transactions</b>	Business and customer information as part of a transaction	Successor entities (merger, acquisition, restructuring)	<b>Restricted</b>	Transfers must comply with §7216 and all privacy obligations
<b>CrossLink Family of Companies (Affiliates)</b>	Personal information for operations and support	CrossLink affiliates and subsidiaries	<b>Only if permitted under §7216 or with consent</b>	Used for internal operations and services
<b>Service Providers &amp; Contractors</b>	Information needed to perform contracted services	Hosting, payment, communications, analytics, security vendors	<b>No TRI unless legally allowed</b>	Bound by confidentiality and FTC Safeguards Rule; may use subcontractors. Service providers and contractors are contractually prohibited from using personal information for

				their own purposes and may process it only to perform services for CrossLink.
<b>Authorized Resellers &amp; Distribution Partners</b>	Account and administrative information	Resellers, distributors supporting onboarding or licensing	<b>No TRI unless permitted or consented</b>	Must follow contractual and legal privacy obligations
<b>Integrations, Events &amp; Non-CrossLink Services</b>	Registration and connection information	Event partners, integration providers	<b>No</b>	You direct the sharing; governed by the partner's own privacy policy
<b>Advertising, Analytics &amp; Social Media (Non-Tax Data Only)</b>	Limited account or usage information	Advertising platforms, analytics partners, social networks	<b>No — TRI never used</b>	Used only to measure marketing effectiveness; state-law opt-outs may apply
<b>Social-Media &amp; Marketing Tool Integrations</b>	Content or account information needed for optional tools	Social-media management or marketing platforms	<b>No TRI</b>	Only when you enable optional features
<b>Testimonials, Forums &amp; Public Content</b>	Content you provide publicly	Website visitors	<b>No TRI</b>	Published with your consent; forum content is public
<b>Mobile Information</b>	Device or mobile number	Not shared with third parties or affiliates for their own marketing or promotional purposes	<b>No TRI</b>	Not shared with third parties or affiliates for their own promotional purposes.

**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 agreed to opt-in to CrossLink’s SMS Program, the following information may apply. For more information regarding our SMS Program, please visit [crosslinktax.com](https://crosslinktax.com), and select the ‘SMS Messaging Terms’ link found in the website footer.”

### **Program Description.**

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, text “STOP” to 59178 or 78589. When you opt-out, you agree to receive a text message confirming that your opt-out choice has been recorded.

### **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 your personal information 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; or
- For services provided by trusted third-party vendors who agree to adhere to our privacy standards.

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.**

We may use a third-party payment processor to handle payments made through our Sites or services. CrossLink does not collect or store your credit card or other financial details. All payment information is provided directly to our third-party processor, whose use of your personal information is governed by its own privacy policy.



CrossLink does not retain any personally identifiable or financial information, such as credit card numbers, in connection with these transactions. For information about our current third-party payment processor, please contact CrossLink Support - [support@crosslinktax.com](mailto: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. We do not transfer Tax Return Information outside the United States unless authorized by law, required for IRS-approved processing, or directed by a tax professional in accordance with 26 U.S.C. §7216.

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.

We retain personal information only as long as necessary to provide our services, meet legal and regulatory obligations, enforce our agreements, resolve disputes, and maintain business records. Retention periods vary based on the type of information and the purpose for which it was collected. When appropriate and consistent with legal, regulatory, and business requirements, we securely delete or de-identify information using commercially reasonable methods. Retention of Tax Return Information is governed by IRS, state, and contractual requirements, which may require longer retention periods than those applicable to other personal information.

## **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.

We comply with applicable data-security requirements established by the Internal Revenue Service, the IRS Security Summit, the Gramm-Leach-Bliley Act, and the FTC Safeguards Rule. Our information-security 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 involves Tax Return Information, CrossLink will follow IRS breach-notification requirements and applicable state laws, which may require notification to tax professionals, affected individuals, and regulators.

## **We do not Knowingly Collect Information from Children.**

Our Sites, products, and services are intended for use by adults and are not directed to children under the age of 13. CrossLink does not knowingly collect, use, or disclose personal information from children under 13. CrossLink's products and services are designed for tax professionals and business customers and are not intended for direct use by children.

If we become aware that we have inadvertently collected personal information from a child under 13 without verified parental consent, we will promptly delete that information. If you believe we may have received information from or about a child under 13, please contact CrossLink Support so that we can take appropriate action.

## **Generative Artificial Intelligence, Machine Learning, and Related 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 our services more efficiently.

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 do not permit those providers to use your personal information for their own generalized model training or unrelated purposes without your consent.

Outputs generated through AI features may be logged and reviewed to improve CrossLink's own products and services but are not used to train generalized third-party models. When AI tools process Tax Return Information, CrossLink handles that information consistent with 26 U.S.C. §7216 and its regulations.

If our use of AI materially changes, we will provide updated notice and obtain any required consent.

## **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 disable all cookies (except Flash cookies). Use the links below to learn how to manage cookies through your browser's settings or help menu:

- Google Chrome
- Microsoft Edge
- [Mozilla Firefox](#)
- Safari (on Mac)

**Please Note:** Some browsers' cookie-management tools do not remove Flash cookies. To manage Flash cookies, visit [Adobe's Flash Player Settings Manager](#). Restricting Flash cookies or other local storage 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](mailto:support@crosslinktax.com).

We offer you certain choices regarding how your personal information is collected, used, and shared. You have the right to access personal information that you provided to CrossLink or that we have collected as described in this Privacy Policy, subject to our information-retention policy. Depending on the state where you reside, you may have additional rights described below.

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 by visiting the “**Do Not Sell or Share My Personal Information**” link on our website and submitting the required form.

#### **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.

If you exercise these options, please be aware that you may still see advertising, but it will not be personalized.

#### **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, you will continue to receive important service or transactional communications related to your account or use of our services.

#### **Appeal Rights for Denials.**

If we deny your request, you may appeal the decision by emailing [support@crosslinktax.com](mailto: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, we will verify your identity before fulfilling any request by matching information you provide with existing records or through other lawful verification methods. If we are unable to verify your identity, we will explain why and may deny your request as permitted by law.

#### **Non-Discrimination.**

We will not discriminate against you for exercising your privacy rights. Please note that certain personal information is necessary to provide our services. For example, if you request deletion of your information, your account will be deactivated, preventing further use of our services. You may create a new account at any time if you choose to use our services again.

## **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 No Sale Notice.**

You may opt out of our sharing your personal information by submitting the “Do Not Sell or Share My Personal Information” form available on our Sites or by contacting us directly. We honor Global Privacy Control (GPC) browser signals as valid requests to opt out of the sale or sharing of personal information as required by California law.

CrossLink does not sell personal information for monetary value and does not treat personal information as “sold” except as that term is defined under the CCPA. We may, however, share limited information with partners to market CrossLink’s products and services across platforms, consistent with the CCPA’s definition of “sharing.”

#### **Your Rights Under the CCPA.**

California residents have the following rights:

- **Right to Know and Access:** You may request a copy of the personal information we have collected about you and details about how we collected, used, and disclosed it during the past 12 months.
- **Right to Delete:** You may request that we delete personal information we hold about you, subject to legal or operational exceptions (e.g., to complete a transaction, detect security incidents, or comply 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 share your personal information for cross-context behavioral advertising. Because we do not sell personal information, no separate opt-out is required.
- **Right to Limit Use of Sensitive Information:** You may request that we limit use and disclosure of sensitive personal information to legally permitted purposes. We already restrict use of such data to those purposes.
- **Right to Non-Discrimination:** We will not deny services, charge different prices, or provide a different level or quality of service for exercising your rights.
- **Financial Incentives:** We do not offer programs or benefits conditioned on the collection or sale of personal information. If such programs are introduced, we will provide prior notice and obtain your opt-in consent. CrossLink does not provide any discounts, financial incentives, paid programs, or benefits conditioned on the collection, retention, sale, or sharing of personal information. If CrossLink offers a program in the future that qualifies as a financial incentive, we will provide a separate Financial Incentive Notice describing the material terms of the program and obtain your opt-in consent before enrolling you.

#### **Categories of Personal Information Collected.**

We collect the categories of personal information listed below, as defined by the CCPA, from the sources described in our Privacy Policy:

Category	Examples / Sources
<b>Identifiers</b>	Name, address, email, phone, IP address, account credentials, SSN, or driver's license—provided directly by you or generated by your interactions with our Sites and services.
<b>Protected Class Characteristics</b>	Age or gender—provided directly or inferred from use.
<b>Commercial Information</b>	Purchase and transaction data—provided by you or collected automatically via cookies or analytics tools.
<b>Internet or Network Activity</b>	Browsing history, search data, or interaction information—collected automatically via cookies or logs.
<b>Geolocation Data</b>	Device or browser-based location data—collected with your consent.
<b>Professional or Employment Information</b>	Information you provide directly.
<b>Inferences</b>	Profiles or preferences derived from other collected data.
<b>Personal Information per Cal. Civ. Code §1798.80(e)</b>	Name, address, contact details, financial data—provided directly.
<b>Sensitive Personal Information</b>	Login credentials, verification documents, or limited account-security data—provided directly or through interactions with our services.

We do **not** collect sensory data.

Retention periods depend on business needs, legal requirements, operational necessity, and potential litigation. Data is securely deleted or de-identified when no longer required.

#### **Categories of Personal Information “Shared.”**

While we do not sell personal information, we may **share** limited categories for **cross-context behavioral advertising**, as defined by the CCPA. You can opt out of this sharing through the methods above. We do not share sensitive personal information.

### **Categories of Personal Information Disclosed for a Business Purpose.**

We may disclose the categories of information above to **service providers** and **contractors** for legitimate business purposes, 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 by:

- Visiting our “**Do Not Sell or Share My Personal Information**” link; or
- Contacting us using the information in “**How to Contact Us.**”

We will verify your request using information already in our records or through other lawful methods and respond within the timeframe required by California law.

## **U.S. State Residents (outside of California).**

This section supplements the information in the Privacy Policy above and describes the rights of residents of U.S. states that have enacted comprehensive consumer data privacy laws (“Applicable State Privacy Laws”). These laws grant residents specific rights regarding their personal information, including the right to access, correct, delete, and obtain a copy of their personal data, as well as the right to opt out of the sale or sharing of personal data and targeted advertising. State definitions of “sale,” “sharing,” and “targeted advertising” vary. CrossLink treats certain analytics and advertising uses as “sharing” or “targeted advertising” even when no money is exchanged.

Depending on your state of residence, you may have the rights to access, correct, delete, and obtain a copy of your personal information; to opt out of targeted advertising, the sale or sharing of personal data, and certain types of profiling; and to appeal denials of privacy requests. CrossLink does not process personal data for profiling in furtherance of decisions that produce legal or similarly significant effects, except where required for fraud prevention or legal compliance. You may exercise these rights using the methods described in the “Your Information Rights and Choices” section.

As of January 1, 2026, the Applicable State Privacy Laws include:

### **State Consumer Privacy Laws Chart**

<b>State</b>	<b>Law Name</b>	<b>Legal Citation</b>	<b>Effective Date</b>
Virginia	Virginia Consumer Data Protection Act	Va. Code §§ 59.1-575 et seq.	In Effect
Colorado	Colorado Privacy Act	Colo. Rev. Stat. §§ 6-1-1301 et seq.	In Effect
Connecticut	Connecticut Data Privacy Act	Conn. Gen. Stat. §§ 42-515 et seq.	In Effect
Utah	Utah Consumer Privacy Act	Utah Code §§ 13-61-101 et seq.	In Effect
Iowa	Iowa Consumer Data Protection Act	Iowa Code ch. 715D	In Effect
Delaware	Delaware Personal Data Privacy Act	Del. Code tit. 6, ch. 12D	In Effect
Oregon	Oregon Consumer Privacy Act	Or. Rev. Stat. §§ 646A.600 et seq.	In Effect

Texas	Texas Data Privacy and Security Act	Tex. Bus. & Com. Code §§ 541.001 et seq.	In Effect
Tennessee	Tennessee Information Protection Act	Tenn. Code §§ 47-18-3201 et seq.	In Effect
Montana	Montana Consumer Data Privacy Act	Mont. Code §§ 30-14-2601 et seq.	In Effect
New Hampshire	New Hampshire Privacy Act	N.H. Rev. Stat. §§ 507-H:1 et seq.	In Effect
New Jersey	New Jersey Data Privacy Act	N.J. Stat. §§ 56:8-1 et seq.	In Effect
Minnesota	Minnesota Consumer Data Privacy Act	Minn. Stat. ch. 325O	In Effect
Maryland	Maryland Online Data Privacy Act	Md. Code Com. Law §§ 14-4601 et seq.	In Effect
Rhode Island	Rhode Island Data Transparency and Privacy Protection Act	R.I. Gen. Laws §§ 6-48.1-1 et seq.	Jan 1, 2026
Kentucky	Kentucky Consumer Data Protection Act	Ky. Rev. Stat. Ann. § 367.180 et seq.	Jan 1, 2026
Indiana	Indiana Consumer Data Protection Act	Ind. Code §§ 24-15-1-1 et seq.	Jan 1, 2026

CrossLink will continue to monitor new state privacy legislation and update this section as additional states enact similar laws. Residents of these states may exercise their rights by submitting a request as described in the “**Your Information Rights and Choices**” section or by contacting us at [support@crosslinktax.com](mailto: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 Notice, please contact us at [support@crosslinktax.com](mailto: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 this page indicates when this Privacy Policy was last revised. Any changes will become effective when the revised Privacy Policy is posted on our Sites. We encourage you to review this Privacy Policy periodically to remain informed about how we protect your information. Your continued use of our Sites, products, or services after any update constitutes your acknowledgment and acceptance of those changes.

## How To Contact Us.

**If you have questions or comments about this Privacy Policy, please contact us. We want your feedback and comments.**

**a) Via Email.** Please contact us by email at [legal@crosslinktax.com](mailto:legal@crosslinktax.com) or [support@crosslinktax.com](mailto:support@crosslinktax.com).

**b) Via Telephone.** Please call us at: (800) 345-4337.

**c) Via Direct Mail.**

Crosslink Professional Tax Solutions, LLC  
 Attention: Legal Dept.  
 2000 N. Alafaya Trail #350,  
 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.