

## **Tax Return Storage – Terms and Conditions**

The Tax Return Storage is a subscription-based service. It is offered by IT Tax and Business Solutions LLC, 5421 N 103<sup>rd</sup> Street, PO Box 34726, Omaha NE 68134.

### **What Is Included?**

- 24/7 Access to your files and folders
- Secure storage vault hosted in the cloud
- Secure and private password and user name (we do not store passwords or autogenerate passwords)
- Affordable prices for individuals or business storage options:
  - Monthly fee for storage is \$7.98 per month for individual tax returns
  - Monthly fee for storage is \$21.98 per month for business tax returns
- Quarterly newsletters with update tax, business and IRS case studies.

### **Terms of Service**

#### **Storage**

- Various plan options are available depending on the individual or business storage plan. The length of time for storage is month to month on a “Pay-As-You Go” basis.
- There is a 30-Day grace period for non-payment cancellations. After 30 days of non-payment, the subscriber’s access will be denied. After 90 days, the subscriber’s account will be closed.
- Subscribers may elect to add “Safe Storage”. This option is an additional fee subject to change based upon the amount of storage per subscriber. “Safe Storage” will keep the subscriber’s documents stored up to 1 year from the date the account was activated. In case of non-payment cancellation, subscribers could re-activate their account after the 90-Day period, pay the current monthly rate at the time of reactivation then access their documents.
- Storage is restricted to tax related documents only & tax returns must be stored by the tax year. No other files are permitted.
- Your tax return information is confidential. No other permissions or access is allowed by our staff or admin team.
- Subscribers may not sublease-or rent out subscriptions to anyone else. If subscriber is deceased or no longer able to make decisions for themselves, Power of Attorney or legal court documents will be reviewed by our legal team.
- Multiple users accounts are not allowed. Only one password per family account will be issued.
- PDF forms, documents, images for W2’s, 1099’s etc. are acceptable file extensions. No media, executable or website(html) files types are permitted. Violating terms, conditions, or privacy terms could result in denied access to your accounts with no refund options.

## **Privacy/Access**

- Your tax return information is confidential. It not disclose your tax information to anyone else without your explicit consent.
- When you create an account, you will be need to authenticate your identity and agree not to falsely imitate someone's identity to gain illegal access to tax information.
- Access is given to one user account with a username and password. We ask that you do not share your password, username or private information to gain access at any time to anyone. It is recommended that you open two accounts if the joint taxpayer will also need access to account.
- If a business or corporate tax returns are to be stored, a company account will be generated giving the primary owner, partner or named shareholder rights to access the account. If the primary owner gives permission for shareholders to access the company's account it must be in writing to allow legal access to the storage account.
- Third party SAAS providers, hosting or website providers will not have login access to any subscriber's account. If at any time you believe your security is compromised, please contact use immediately. Likewise, all subscribers will be contacted if security is breached.

## **Joint Accounts**

- Albeit rare, we may accommodate subscribers if an account may need to be altered in case of legal separation or divorced when joint returns are stored.

## **No Refunds**

- Once payment has been received your service will be activated and no refunds are allowed. You may cancel your account at any time. You may download your documents and request your account to be closed in writing or use the cancellation request form in the portal.

## **Cancellations request**

- If annual subscriber, you may request to close your account at any time. No refunds after 90 days of storage. You may download your documents and request your account to be closed in writing or use the cancellation request form in the portal.

## **Privacy Statement**

### **What is tax information privacy and how do Tax Return Storage protect it?**

- The issue of tax information privacy is covered by Internal Revenue Code Section 6103. The code, 26 U.S. Code § 6103, prohibits the Internal Revenue Service and tax professional from disclosing your tax information to anyone without your explicit consent.
- Your tax return information is confidential and we will not disclose your tax information to anyone else without your explicit consent.
- Tax Return Storage private label website is not intended for children and do not knowingly collect data related to children.
- By accessing and using Tax Return Storage services, you are consenting to monitoring, interception, recording, reading, copying or capturing by authorized personal (administrator) of all activities, including detection and prevention of

any unauthorized use of our private label and Tax Return Storage terms and conditions.

- Do not create or access Tax Return Storage for anyone other than yourself. If owner of a business, any other members, shareholders or partners are not granted permission without the primary person on the account giving authorization for other owners to be added to the company account.
- Tax Return Storage protects personal, sensitive information and is not limited to personally identifiable information, financial, payment information, authentication, phonebook, contacts, SMS, call related data, microphone, camera sensor data, sensitive device or usage data.
- Tax Return Storage uses a SAAS (Software as a Service) solution to store data, files and document folders powered by the Amazon AWS technology which is safely stored in “best in class” data centers around the globe daily, encrypted networks, however, text messages and tasks are not encrypted at rest but active in the database.
- All credit card transactions are processed using secure encryption—the same level of encryption used by leading banks. Card information is securely transmitted one time using our 3rd party payment gateway, who then processes the card information. Only an identifying hash (ID number) is stored by the authorized payment provider. No payment information or credit card numbers are ever stored on their (providers’) servers.
- Contact information: Tax Return Storage, PO Box 34726, Omaha NE 68134. Email: [staff@taxreturnstorage.com](mailto:staff@taxreturnstorage.com).