



Sum Bookkeeper, LLC
Privacy Practices and Principles

Protecting your information is important to Sum Bookkeeper, LLC. The following guidelines set forth our general privacy practices and principles that apply to information we collect through our provided services.

What information do we collect?

We may collect information, including personal information, about you, your spouse, your dependents, or your business when you use our services. The information we collect includes, but is not limited to:

Contact Information (e.g., name, phone number, address, and email address); **Social Security Number** and other government identification numbers (e.g., EIN and ITIN); **Date of Birth**; **Financial Information** (e.g., income, revenue, assets, credits, deductions, and expenses) **Payment Data** (e.g., checking, debit and credit card account numbers, balances and payment history); **Health Information** (e.g., health insurance status and financial information related to payment for healthcare services); **Website, Mobile Application, and Email Usage Data**;

Where do we get this information?

You provide us with most of the information we collect. We also receive information through certain digital technologies when you interact with us. Finally, other companies and government entities may share information with us.

We collect information directly from you.

We collect information you voluntarily provide as part of using our services. This information includes information you provide as part of preparing your bookkeeping records or tax return, setting up an online account, authenticating your identity, purchasing a product or service on your behalf, or applying for employment. It also includes documents you choose to upload to your QuickBooks Account. If you choose not to provide certain information we request, we may be unable to serve you as our products, services, tools or calculators may rely upon this information.

Our website and social platforms may offer publicly accessible blogs or community forums. You should be aware that any information you provide in these areas may be read, collected, and used by others who access them.

We collect information when you use our services. The Internal Revenue Service (IRS) requires us to collect certain personal and system information in connection with preparing or electronically filing your tax return. This may include name, social security number, Internet Protocol (IP) addresses and unique device identifiers.

We collect information from other companies and government entities. With your consent, we may disclose to us certain information that has previously been provided to one of those entities. In accordance with their privacy notices, our affiliates, our business partners, and non-affiliated third parties (including the IRS and credit reporting agencies) may share certain information about you with us.

How do we use your information?

We will use your information to provide you with the products and services you request. We may also use your information, as permitted by law, to service and report on your account and to offer you relevant information, products, or services. These activities may be performed by us or a service provider acting on our behalf.

QuickBooks Account. We may use your information to set up an online account or authenticate your identity. We may use your email address as your online username.

Who do we share your information with?

We do not sell or rent your information without your consent. We may, however, share your information with your consent or as permitted by law. We may disclose your information as described below:

Third Parties. We do not sell or rent your personal information to third-party direct marketers. Additionally, 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.

Communications with the IRS. The Internal Revenue Service requires us to disclose certain personal and system information, including name, social security number, Internet protocol (IP) addresses and unique device identifiers, in order to process or electronically file your tax return.

As Required or Permitted by Law. We may disclose your information to affiliated or non-affiliated third parties when we have a good faith belief that such disclosure is required or permitted by law. This may occur in connection with a court order, legal process, or other judicial, administrative or investigative proceeding that produces a request for information from Sum Bookkeeper. We may disclose your information to proper federal, state, or local officials in order, and to the extent necessary, to inform the official of activities that may constitute, or may have constituted, a violation of any criminal law or to assist the official in investigating or prosecuting a violation of criminal law.

How long do we keep your information?

We keep your information for as long as needed or as required by law.

We retain your information for as long as your account is active or as needed to provide you services. We may use your information as necessary to comply with our policies, legal obligations, resolve disputes, and enforce our agreements.

The IRS requires us to retain filed tax returns for a period of at least three years.

It is our policy that if you start, but do not complete, a tax return, we will generally keep the tax return information you provide until the end of that tax season, after which it will be deleted from our system.