

# Privacy Policy

*Fast Tax Works LLC (thefasttax.com)*

*Effective Date: December 23, 2025*

This Privacy Policy explains how The Fast Tax ("Fast Tax," "we," "us," or "our") collects, uses, discloses, and safeguards information when you visit our website, create an account, communicate with us, or use our tax preparation and related services (collectively, the "Services").

## 1. Scope

This Privacy Policy applies to information we collect through the Services, including information you provide to us directly, information collected automatically when you use our website or client portal, and information we receive from third parties as permitted by law.

## 2. Information We Collect

We may collect the following categories of information:

- Contact information: name, email address, phone number, mailing address.
- Account information: login credentials, authentication data, security questions, and account preferences.
- Tax and financial information: income documents (e.g., W-2, 1099), deductions, credits, filing history, bank account details for direct deposit, and related records you provide to prepare and file returns.
- Identity verification information: government-issued ID details, Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN), date of birth, and related information where required to provide Services.
- Business information (if applicable): entity details, EIN, bookkeeping records, and payroll-related information you provide.
- Communications: messages, emails, call notes, and support requests.
- Device and usage information: IP address, browser type, device identifiers, pages viewed, timestamps, and referral URLs.
- Cookies and similar technologies: data collected through cookies, pixels, and analytics tools (see Section 7).

## 3. How We Use Information

We use information we collect to:

- Provide, operate, and improve the Services, including preparing and filing tax returns and related forms.
- Verify your identity, authenticate access, and protect against fraud or unauthorized activity.
- Communicate with you about your account, requests, appointments, and support needs.
- Process payments and manage billing (through payment service providers).
- Comply with applicable laws, regulations, and professional obligations, including responding to lawful requests.
- Maintain records, perform internal analytics, quality assurance, and training.
- Send service-related updates and, where permitted, marketing communications (you may opt out of marketing emails).

## 4. How We Share Information

We do not sell your personal information. We may share information in the following circumstances:

- With tax authorities: to prepare, e-file, and submit returns and related forms to the IRS and applicable state/local agencies, and to respond to notices you ask us to handle.
- With service providers: vendors that help us operate the Services (e.g., secure hosting, document storage, analytics, customer support, e-signature, payment processing), subject to confidentiality and security obligations.
- With professional advisors: accountants, attorneys, auditors, or consultants who assist us, as necessary for business operations and compliance.
- For legal and safety reasons: to comply with law, court orders, subpoenas, or to protect rights, safety, and security of Fast Tax, our clients, or others.
- Business transfers: in connection with a merger, acquisition, financing, reorganization, or sale of assets (subject to appropriate safeguards).
- With your direction or consent: when you instruct us to share information or when written consent is required.

Tax return information is subject to additional legal protections. We do not disclose or use your tax return information for purposes other than providing the Services unless authorized by law or with your written consent when required (including under Internal Revenue Code Section 7216 and related regulations).

## 5. Data Security

We use administrative, technical, and physical safeguards designed to protect information, such as access controls, encryption where appropriate, secure transmission methods, and limited-access procedures. However, no method of transmission over the internet or method of electronic storage is 100% secure. We cannot guarantee absolute security.

## 6. Data Retention

We retain information as long as reasonably necessary to provide the Services, maintain our records, comply with legal and regulatory obligations, resolve disputes, and enforce agreements. Retention periods may vary depending on the type of information and applicable requirements.

## 7. Cookies and Analytics

We may use cookies and similar technologies to operate our website, remember preferences, improve functionality, and understand usage. You can control cookies through your browser settings. If you disable cookies, some features may not function properly.

## 8. Your Choices and Rights

Depending on your location and applicable law, you may have rights to:

- Request access to or correction of certain personal information we maintain about you.
- Opt out of marketing emails by using the unsubscribe link (service-related messages may still be sent).
- Request information about how we process your information and how to exercise your rights.

To make a request, contact us using the details in Section 12. We may need to verify your identity before processing certain requests.

## 9. Third-Party Links and Services

Our Services may include links to third-party websites or integrations. We are not responsible for the privacy practices of third parties. We encourage you to review their privacy policies.

## 10. Children's Privacy

The Services are not directed to children under 13, and we do not knowingly collect personal information from children under 13. If you believe a child has provided information to us, contact us so we can take appropriate action.

## 11. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. We will post the updated version on our website and update the Effective Date. Your continued use of the Services after an update means you accept the updated policy.

## **12. Contact Us**

If you have questions about this Privacy Policy or our privacy practices, contact us:

- Fast Tax Works LLC
- Email: [info@thefasttax.com](mailto:info@thefasttax.com)
- Phone: [669-365-3278](tel:669-365-3278)
- Mailing Address: