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LAST UPDATED: January 25, 2022

FirmWorks, a subsidiary of Right Networks, and its subsidiaries and affiliates, and owner of the CPA Practice Advisor, Tally Street, and Rootworks branded products, (“FirmWorks”, “we”, or “us”), recognizes the importance of protecting the privacy of information provided to us by those who use our products and services and associated websites, including this CPA Practice Advisor website (collectively, “Web Sites”). Our goal is to provide you with an experience that delivers the information, resources and services that are helpful to you. In order to achieve this goal, we may collect information from you. This policy describes how personally identifiable and anonymous information about our publication subscribers, online media product users and event registrants may be collected, used and shared.

Please be sure to read this Privacy Policy before using any Web Site owned and operated by FirmWorks or its subsidiaries and affiliates or submitting information to us. This Privacy Policy is current as of the date written above. If we change our privacy practices, we will also update this Privacy Policy. Users should review this policy periodically to monitor any changes. Your continued use of our Sites and services constitutes your acceptance of this Privacy Policy, as updated from time to time.

We will only process your Personal Data in accordance with applicable data protection and privacy laws. Importantly, we note that we are a “controller” for those services where we make decisions on how personal information is used in connection with our services, and we are a “processor” for those services where we only use personal information as allowed by our customers. For the purposes of UK and EU data protection legislation, when acting as a “controller”, the data controller is [FirmWorks].

How do we collect your information?

FirmWorks uses cookies and other internet technologies in the management of our

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generally improve the user experience. They can also help to ensure that advertisements you see online are more relevant to you and your interests. Our cookies do not contain any information that is personally identifiable.

Like many web sites, we use pixel tags, also known as web beacons, clear gifs, or web bugs, which are small graphic files that allow us and third parties to monitor the use of the Web Sites and collect usage data. We may use pixel tags, either provided by us or by our third-party advertisers, service providers and ad networks, to collect information about your visit, including the IP address of the computer that downloaded the page on which the tag appears, the pages you view, the links you click and other actions taken in connection with our Web Sites and use them in combination with our cookies to provide offers and information of interest to you. Pixel tags help us improve our understanding of our web traffic and visitor behavior, as well as gauge the response to our promotional efforts.

We use industry-standard, third party advertising service companies, such as AdRoll, to target and serve advertisements when you visit our Sites or open our emails. These third-party companies may use cookies, pixel tags, and other similar technologies to collect information about your visit to our Web Sites, in order to provide you with relevant advertisements about products, services, and events. These collection methods do not typically include your name, address, or telephone number. These elements also provide us with aggregate pictures of traffic patterns, which help us to improve your experience on our Web Sites and monitor advertising effort. This usage data we collect does is generally non-identifying, but if we associate it with you as a specific and identifiable person, we treat it as Personal Data.

Our Web Sites use the following types of cookies for the purposes set out below:

Strictly Necessary Cookies

Analytics and Performance Cookies

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point after setting your browser to refuse all cookies or indicate when a cookie is being sent, you will have to again reset your browser to refuse all cookies or indicate when a cookie is being sent. If you wish, you may disable pixel tags by setting your browser to omit images and disable JavaScript.

You can find more information about cookies and how they work, what cookies have been set on your computer or mobile device and how to manage and delete them at <http://www.allaboutcookies.org> and <http://www.youronlinechoices.com/uk>.

When is personally identifiable information collected? How is your information used?

FirmWorks collects information by which someone could identify you as a specific, identifiable individual (we refer to this type of information in this Privacy Policy collectively as “Personal Data”) that you choose to provide us when you subscribe to our magazines, sign up for e-newsletters, enter a contest, participate in surveys, login into our Web Sites using a third party login system (including, but not limited to, Facebook Connect, Twitter, etc.), register for a Web Site, webcast, or trade show, or otherwise communicate with us. When you provide this information to us, you are no longer anonymous.

We refer collectively to all information we collect that is not Personal Data, including usage data collected from cookies, pixels and similar technologies discussed in this Privacy Policy, demographic data and de-identified Personal Data, as “Non-Personal Data”. If we combine Non-Personal Data with Personal Data, we will treat the combined information as Personal Data under this Privacy Policy.

We may use your contact information to send notices for subscription renewal or provide you with information about products or services you have ordered with us. We may also use your contact information to send you e-newsletters or other promotional e-mails that contain targeted, relevant content that may be useful to

your business. All promotional e-mails you receive from us will include an option to

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provide you with updates on FirmWorks offerings and features, to provide you with product information from manufacturers in our database, and to provide our sponsors and business partners with data about our users.

We may disclose aggregated information about users and information that does not identify any individual, without restriction. We also reserve the right to disclose your Personal Data if we are required to do so by law, or in the good faith belief that disclosure of the information is reasonably necessary to comply with legal process, to respond to claims, or to protect or advance the rights, property, safety, or well-being of our company, our employees, customers, or the public. In the unlikely event that all FirmWorks assets or substantially all of its assets are acquired, then user and customer information, which may include Personal Information, may be one of the transferred assets.

We use the information we collect, including Personal Data and Web Site usage data:

- to enable you to use our Web Sites, to create an account or profile, to process information you provide via our Web Sites (including verifying that your email address is active and valid) and to process your transactions;
- to provide related customer service and care, including responding to your questions, complaints, or comments and sending surveys (with your consent) and processing survey responses;
- to provide you with information, products, or services that you have requested;
- to receive and process job applications for jobs with us;
- with your consent, to provide you with information, products, or services that we otherwise believe will interest you, including special opportunities from us and our third-party partners;
- to tailor content, recommendations, and advertisements we and third parties display to you, both on the Web Sites and elsewhere online;

- for internal business purposes, such as to improve our Web Sites and services;

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How do we secure and store your information?

We use reasonable precautions, including appropriate technical, administrative, and physical procedures, to try to protect collected Personal Data from loss, misuse, or alteration.

Many of our Web Sites contain links to websites owned and operated by unaffiliated third parties. These links are provided as a service to you, and do not constitute our endorsement or support of those third parties or their websites. Each third party website has its own information collection and use practices, and we advise you to review their policies.

FirmWorks is not responsible or liable for third party privacy practices or the content of third party sites. We are not responsible or liable for any breach of security or for the actions of these parties.

Due to the design of the Internet and other factors outside our control, we cannot guarantee that communications between you and our servers will be free from unauthorized access by third parties. Any information you provide may be stored and maintained in a FirmWorks database, either housed at FirmWorks or with a third-party vendor. In the case of a sale, change of ownership or merger involving FirmWorks or any parent, subsidiary or affiliated company, your information may be transferred to a third party.

Passwords may be used by a Web Site to protect your Personal Data. We recommend that you do not share your passwords with anyone and notify us promptly if you believe your password security has been breached. We will never ask you for your password in an unsolicited phone call or in an unsolicited e-mail. Also, if you are using a computer that others have access to, such as one in a computer lab, Internet

cafe or public library, always remember to log out and close your browser window

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information you share may be viewed by any other user of the Web Sites.

We will retain your Personal Data and any information collected from your use of our Web Sites for as long as you are a Subscriber or otherwise maintain a user account on our Web Sites and for a reasonable time thereafter.

What options do you have about how we use or share your information?

We strive to provide you with choices regarding the Personal Data you provide us. To exercise control over your information, we have provided you with the following mechanisms:

If you no longer wish for us to share your mailing address or other contact information with our sponsors or other third parties, you may adjust your account preferences, or you can send us an e-mail at dpo@cpapracticeadvisor.com. For us to be able to locate your record, your e-mail must include your name, mailing address, e-mail address, and must identify the FirmWorks product, event, or service for which you are registered. We will strive to process your request within 10 business days, and thereafter we will no longer share your contact information with third parties. Please note that we will not be able to stop third parties from sending you information about their products or services if your information was shared with them before we received your request.

Regarding e-mail specifically, you have the opportunity to elect to stop receiving advertising messages from FirmWorks about our products or services each time you receive such a communication from us. To unsubscribe from such advertising e-mail messages, please follow the directions included in that e-mail message. We will strive to process your request within 10 business days. Please note that during that time, you may continue to receive e-mail messages from FirmWorks about its products or services or those of our affiliates or customers.

If you receive broadcast e-mail messages that we may send about third party

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payment or bill information.

Your Consent

By using our Web Sites, you are consenting to our processing of your information as set forth in this Privacy Policy. "Processing" means using cookies on a computer or handheld device or using or touching information in any way, including, but not limited to, collecting, storing, deleting, using, combining and disclosing information, all of which activities will take place in the United States. If you reside outside the United States your information will be transferred, processed and stored there under United States privacy standards.

How Can I Access, Correct, or Amend Information About Me?

We want to assure you that you have access to your Personal Data that we collect and store. Customers may correct or amend information that is inaccurate by reviewing and updating your account preferences or by contacting us by email at dpo@cpapracticeadvisor.com or by mail at FirmWorks Attention: Data Privacy Officer, 14 Hampshire Drive, Hudson, NH 03051.

Collection and Use of Information from Children

Our Web Sites are not intended for children under 16 years of age. No one under age 16 may provide any personal information to or on our Web Sites. We do not knowingly collect personal information from children under 16. If you are under 16, do not use or provide any information on this Web Site or on or through any of its features. If we learn we have collected or received personal information from a child under 16 without verification of parental consent, we will delete that information. If you believe we might have any information from or about a child under 16, please send an email to: dpo@cpapracticeadvisor.com You may also mail your request to

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worry about the content being stolen. If you use a browser that does not support SSL, you may not be able to access our Web Site or input information.

Do Not Track Signals

Your browser may offer you a "Do Not Track" option, which allows you to signal to operators of Web Sites and web applications and services (including behavioral advertising services) that you do not wish such operators to track certain of your online activities over time and/or across different Web Sites. Our Web Sites do not support Do Not Track requests at this time, which means that we collect information about your online activity while you are using our Web Sites.

California Privacy Rights

This section ("California Statement") explains rights that certain natural persons residing in the State of California (each, a "consumer") may have under the California Consumer Privacy Act of 2018 and such rules and regulations as may be adopted from time to time implementing and interpreting such Act (collectively, "CCPA"). When we use the term "personal information" in this California Statement, we are using that term as CCPA defines it, which CCPA generally defines "personal information" to mean information that identifies, relates to, describes, is capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer or household. However, personal information does not include publicly available, deidentified, or aggregate consumer information (which are all defined in CCPA). Also, the definition of "personal information" also does not currently apply to the collection of personal information from job applicants, employees (whether you are our employee or any employee of our customers), business owners, directors, officers, medical staff or contractors. Where we act as a "business" under CCPA (meaning we determine the manner and reasons for why we process your personal information), we may be required to disclose additional information regarding the categories of personal information we collect, the sources

where we obtain that information, the purposes for why we collect that information,

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telephone number;

- Information that identifies, relates to or is capable of being associated with an individual, such as financial information;
- Characteristics of protected classifications under California or federal law such as race, sex/gender or marital status;
- Commercial information such as subscription history;
- Internet or other electronic network activity information such as browsing history;
- Geolocation data, available through your device, if enabled;
- Audio, electronic, or similar information;
- Professional or employment-related information;
- Education information;
- Other personal information, as described to you in this privacy policy, or otherwise at the point of collection; and
- Inferences drawn from any of the information identified above, including about your preferences.

Depending on your relationship with us, we may have collected each of the above categories of Personal Information about you. In addition, we may have shared one or more of these categories of Personal Information with third parties during the preceding 12 months for the business purposes described in this Privacy Policy. For each of these categories of Personal Information, please refer to the “When is personally identifiable information collected? How is your information used?” section above for more detailed information regarding why we collect personal information and the categories of third parties with whom we may share personal information.

If you are a resident of California and are not a job applicant, employee/contractor, or employee/contractor of another company interacting with us in your job role, you

have the right to request what category of personal information we collect about

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California residents also have certain rights regarding the “sale” of “personal information” (as such terms may be defined by CCPA). California residents have the right to opt out of such “sale” of their “personal information” in accordance with CCPA by sending an email to our Data Privacy Officer at dpo@cpapracticeadvisor.com or in writing to FirmWorks, Attention: Data Privacy Officer, 14 Hampshire Drive, Hudson NH 03051.

We will not discriminate against you because you have exercised any of your privacy rights under the CCPA.

Users Outside of the United States and Consent to Transfer

The Web Sites and services provided by FirmWorks are operated in the United States. If you are located in another jurisdiction, please be aware that information you provide to us will be transferred to, stored and processed in the United States. By using the Web Sites or providing us with any information, you consent to this transfer, processing, and storage of your information in the United States, a jurisdiction in which the privacy laws are not as comprehensive as those in the country where you reside or are a citizen, such as the European Union. You understand that the U.S. government can obtain access to the Personal Data you submit if necessary for investigative purposes (e.g., terrorism investigation). We will take all steps reasonably necessary to ensure that your data is treated securely and in accordance with this Privacy Policy. We use appropriate and suitable safeguards for transferring your Personal Data to the U.S.

Your EU Data Subject Rights

If you are a resident of the European Economic Area (EEA), we collect and process Personal Data about you only where we have a legal basis for doing so under

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Sites and to protect our legal rights and interests.

- You give us consent to do so for a specific purpose.
- We need to process your Personal Data to comply with a legal obligation.

If you have consented to our use of Personal Data about you for a specific purpose, you have the right to change your preferences at any time.

We note that we are a “controller” for those services where we make decisions on how personal information is used in connection with our services, and we are a “processor” for those services where we only use personal information as allowed by our customers.

Where we make decisions on how personal information is used in connection with our Web Sites, products or services (where we are acting as a controller), we are responsible for the obligations of a “controller” under applicable laws in connection with the processing of personal information – for example, we use this Privacy Statement and other notices to provide you with information about our use of personal information, as required by law. Where we only use personal information as allowed by our customers (where we are acting as a processor), our customers are similarly responsible for the obligations of a “controller” under applicable laws in connection with the processing of personal information.

We may use your email address to send you newsletters or marketing emails. We will ask for your consent consistent with the applicable law when you first provide your Personal Data. You can opt out by following the unsubscribe instructions included in these emails, or you can contact us at dpo@cpapracticeadvisor.com or in writing to FirmWorks, Attention: Data Privacy Officer, 14 Hampshire Drive, Hudson NH 03051.

Requesting Access to Your Personal Data.

You have the right to request access to any Personal Data we hold about you as well

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Requesting Erasure of Your Personal Data.

You have the right to request that Personal Data held about you is deleted.

Requesting Restriction of Processing Your Personal Data.

You have the right to prevent or restrict processing of your Personal Data.

Requesting Transfer of Your Personal Data.

You have the right to request transfer of Personal Data directly to a third party where this is technically feasible.

Where you believe that we have not complied with our obligation under this privacy policy or European data protection law, you have the right to make a complaint to an EU Data Protection Authority, such as the UK Information Commissioner's Office.

Document History

Last updated: January 25, 2022

For any questions about this policy, please direct to our data privacy officer at dpo@cpapracticeadvisor.com or in writing to FirmWorks, Attention: Data Privacy Officer, 14 Hampshire Drive, Hudson NH 03051.

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