

CCH Small Firm Services Privacy Statement

[Revised: December 8, 2011]

CCH Small Firm Services ("CCH SFS") makes it a top priority to protect your privacy and the confidentiality of the personal information you enter into its web sites (i.e., taxwise.com, atxinc.com, support.taxwise.com, myatx.com, taxwisetv.com, atxinctv.com, cchsfs.com – collectively, our "Web Sites") or provide to us offline via guest registration cards or otherwise. CCH SFS takes the following position regarding your rights to privacy and confidentiality. Please read this statement carefully and refer to it whenever necessary. If you have any questions, please contact our legal department at: CCH SFS Legal Dept, 225 Chastain Meadows Court NW, Suite 200, Kennesaw, GA 30144 or by e-mail at legal@cchsfs.com.

CCH SFS wants to demonstrate its commitment to your privacy. This Privacy Statement discloses the privacy practices for CCH SFS and our Web Sites, including:

1. What personally identifiable information of yours or third party personal identification is collected from you through our Web Sites and otherwise;
2. How the information is used;
3. With whom the information may be shared;
4. What choices are available to you regarding collection, use and distribution of the information;
5. The kind of security procedures that are in place to protect against the loss, misuse or alteration of information under CCH SFS' control; and
6. How you can correct any inaccuracies in the information.

While the nature of our business and our Web Sites is strictly financial and are not designed to appeal to children under the age of 13, we do believe that protecting the privacy of the very young is especially important. For that reason, we do not knowingly attempt to solicit or receive any information from children.

Information Collection and Use

CCH SFS is the sole owner of the information we collect. CCH SFS collects information from our users at several different points on our Web Sites as well as through guest registration cards, product ordering, product registration, and various other means. We will not sell, share, or rent this information to others in any way that differs from what is disclosed in this statement.

By providing CCH SFS with your contact information you expressly consent to CCH SFS' use of this contact information, including to provide you with information on products and services offered or to be offered by CCH SFS and its affiliates, as well as to allow select other parties with whom CCH SFS conducts business ("Third-Party Providers") to provide you with information about certain products and services. In the event you desire to no longer receive communications regarding product information from CCH SFS, you may notify CCH SFS via e-mail (marketing@cchsfs.com) or by mail at CCH SFS Marketing Dept, 225 Chastain Meadows Court NW, Suite 200, Kennesaw, GA 30144 and request removal from product information mailings by CCH SFS.

Registration

In order to access advanced support options online at our customer support site, a user must first complete the user login form. During this login process a user is required to give his/her User Name, Client ID, EFIN and/or registration code. This information is used to identify the user before he/she accesses the advanced support options. The user is required to provide this information when accessing advanced support options so that we can provide a more personalized support experience.

Ordering

Our product order forms require you to disclose personal information. Here a user must provide contact information (such as name and shipping address) and financial information (such as credit card number and expiration date). This information is used for billing purposes and to fulfill the customers' order(s). If we experience difficulty while processing an order, the contact information is used to contact the user. Use of all CCH SFS products is subject to the terms and conditions of the then current Software License Agreement.

Cookies

A cookie is a small text file that is placed on a user's hard drive by a web browser, at the request of a web page server. Cookies cannot be used to run programs, deliver viruses to your computer, or extract personal information from your computer. The cookies we assign to you are unique, and can only be read by our web servers. Cookies can provide our users with a more personalized and convenient visit to our Web Sites. For instance, by setting a cookie on our site, the user may not have to reenter their username

multiple times, thereby saving time while on our site. However, a user can still use our site if they reject the cookie. Cookies may also enable us to track and target the interests of our users in order to enhance the experience customers have while on our sites.

Log Files

We use Internet Protocol ("IP") addresses to analyze trends, administer our site, track users' movement, and gather broad demographic information for aggregate use. IP addresses of visitors to our public Web Sites are not linked to personally identifiable information. CCH SFS may, in its sole discretion, record the IP address of the computer from which an electronically filed return originated as part of our ongoing effort to detect fraudulent information being transmitted via the Internet.

Sharing

CCH SFS may share information with its parent and/or sister companies for internal technical and administrative purposes.

From time to time, CCH SFS may outsource the performance of certain administrative functions (e.g., processing credit card transactions, mailing CCH SFS marketing or account information, performing some accounting services). In these situations the third-party service providers do not retain, share, store or use personally identifiable information for any secondary purposes.

CCH SFS partners with third party companies that provide specific services such as merchant services, tech support and bank product processing. When you sign up for services or products of a third party with whom CCH SFS conducts business, CCH SFS will share your name or contact information to the extent necessary for the third party to provide such products or services. These parties are not granted permission by CCH SFS to use personally identifiable information for any purpose other than providing these services; however, such third parties may have a different privacy policy.

Although CCH SFS does not sell or rent its customer lists, it may share your contact information with carefully selected Third-Party Providers for purposes of providing you with information about products and services that may be useful for your business. In such situations, CCH SFS will enter into a written agreement with the Third-Party Provider prior to sharing your information and such agreement will contain confidentiality and non-disclosure provisions intended to protect your information.

Except as set forth in this Privacy Statement, personally identifiable information is not otherwise released by CCH SFS to outside parties unless required by law or legal process (for example, subpoena or court order). CCH SFS reserves the right to make exceptions to this policy in exceptional circumstances (such as suspected illegal activity) on a case by case basis and at the sole discretion of CCH SFS. CCH SFS abides by applicable laws and regulations governing the disclosure of information to governmental agencies.

Links

Our Web Sites may contain links to other web sites. Please be aware that CCH SFS is not responsible for the privacy practices of such other sites. We encourage our users to be aware when they leave our site and to read the privacy statements of each and every web site that collects personally identifiable information. This privacy statement applies solely to information collected by the Web Sites of CCH SFS and no other sites.

Newsletter

We provide users the opportunity to receive newsletters via e-mail. If a user wishes to subscribe to our newsletter, we ask for contact information such as name and e-mail address. Users who no longer wish to receive our newsletter may opt-out of receiving these communications by using the unsubscribe option in the newsletter email or by contacting CCH SFS Marketing at marketing@cchsfs.com.

Surveys & Contests

From time-to-time we request information from users via surveys or contests. Participation in these surveys or contests is completely voluntary and the user therefore has a choice whether or not to disclose this information. Information requested may include contact information (such as your name and shipping address), and demographic information (such as zip code, business size, etc.). Contact information will be used to notify contest winners and to award prizes. Survey (demographic) information will be used for the purposes of monitoring or improving the use and satisfaction of our site, products and/or services. Our surveys and contests may have separate rules other than those listed above. We will identify how the information supplied may be used in each such individual case.

Security

CCH SFS takes strong precautions to protect our users' information. When users submit sensitive information to CCH SFS via the Web Sites or otherwise, their information is protected both on-line and off-line.

When our return query form asks users to enter sensitive information such as a social security number, that information is protected with encryption software that sets the Internet standard for secure transactions – Secure Sockets Layer technology (“SSL”). While on a secure page the lock icon on the bottom of web browsers such as Microsoft Internet Explorer becomes locked, as opposed to un-locked or open, when you are just ‘surfing’. To learn more about SSL and CCH SFS' online security measures, see our Security Statement (available from the footer of our web site).

While we use SSL encryption to protect sensitive information online, we also take strong precautions to protect our users' information off-line. All of our users' information, not just the sensitive information mentioned above, is restricted in our offices. Only employees who require the information to perform a specific job (for example, our billing clerk or a customer support representative) are granted access to personally identifiable information. Our employees must record the instance in your records each time your information is accessed. Furthermore, ALL employees are kept up-to-date on our security and privacy practices. On an ongoing basis, as well as any time new policies are added, our employees are notified and/or reminded about the importance we place on privacy and what they can do to ensure our users' information is protected. Finally, the servers that we store personally identifiable information on are kept in a secure environment, in a limited access room inside a locked case.

Site and Service Updates

From time to time we may send the user announcements regarding site and customer service updates. Members are not able to unsubscribe from customer service announcements, which contain important information about the service. We communicate with the user to provide requested services and in regards to issues relating to their account via e-mail or phone. It is the user's responsibility to ensure that his/her contact information is current and correct for various purposes.

Correction/Updating Personal Information

If a user's personally identifiable information changes (such as e-mail address), or if a user no longer wishes to use our services, we will provide a way for the user to correct, update or remove the personal data they provided to us. Information regarding how to make such changes is available by contacting Customer Support. Most changes can be accomplished by submitting the change in writing with the signature of the account owner. When requesting a change, please provide the current information as well as the corrected information as it should appear following the change. Your customer identification number, printed name, title, signature and contact telephone number must also be included so that we may verify the request. Whenever possible, supporting documentation should be provided to validate the requested change (e.g. if you have been issued a new EFIN, please submit a copy of your IRS confirmation letter showing the new EFIN). Requests should be addressed to "Data Entry" and may be faxed to 1-800-834-4859.

Change of Control

In the event of a sale, merger, transfer, exchange or other disposition (whether of assets, stock or otherwise) of all or a portion of CCH SFS and/or its subsidiaries, users personally identifiable information may be transferred. Users will have the opportunity to opt-out of further secondary use of information following any change of control.

Notification of Changes

If we decide to materially change our Privacy Policy, we will post those changes on the page(s) of our Web Sites where the policy is regularly located (and with an updated revision date) so that our users can always be made aware of what information we collect, how we use it, and under what circumstances, if any, we disclose it. We will use information in accordance with the Privacy Policy under which it was collected. CCH SFS encourages you to periodically review this Privacy Policy to be informed of how we are protecting your information.

Customer Responsibilities

While CCH SFS provides significant security measures to protect the privacy and confidentiality of the user's information, the tax preparer customer is responsible for protecting the confidentiality of the individual EFIN and registration code assigned to his/her office, and any UserIDs and passwords created within the software. The customer is also responsible for protecting the confidentiality of all tax return information originating from his/her account, and more particularly such information that is accessed through the use of such EFIN, registration code, UserIDs and/or passwords.