

# Drake Software Privacy Notice

*Last Updated: July 1, 2024*

## **Contents**

- [Personal Information We Collect](#)
- [How We Use Your Personal Information](#)
- [How and Why We Disclose Your Personal Information](#)
- [Tax Return Information](#)
- [Cookies, Tracking Technologies, and Interest-Based Advertising](#)
- [How We Safeguard Your Personal Information](#)
- [Children](#)
- [Generative Artificial Intelligence, Machine Learning, and Related Tools](#)
- [Other Online Services](#)
- [Your Choices](#)
- [Additional California Disclosures](#)
- [Additional Oregon Disclosures](#)
- [Data Storage and Transfer](#)
- [Notice of Changes](#)
- [Accessibility](#)
- [Contact Information](#)

This Privacy Notice describes the personal information practices of Drake Software (“**Drake**”, “**we**”, “**us**” or “**our**”), including how we may collect, process, and disclose personal information from you or that you may provide on our websites, including [drakesoftware.com](https://drakesoftware.com) and its subdomains (including [support.drakesoftware.com](https://support.drakesoftware.com)), Drake Portals at [securefilepro.com](https://securefilepro.com), and [cloud.drakezero.com](https://cloud.drakezero.com) (including Web1040 and Drake Zero) (the “**Sites**”), as well as to the associated online properties, products, and professional services offered by Drake (collectively, “**Our Services**”).

This Privacy Notice covers Drake’s practices for collecting, using, maintaining, protecting, and disclosing information you provide through our Services.

## **Personal Information We Collect**

We may collect the following categories of personal information:

<b>Category</b>	<b>Purpose</b>	<b>How We Collect</b>
<p><b>Identifiers</b>, such real name, postal address, unique personal identifier, online identifier, Internet Protocol address, email address, account name, Social Security number, driver’s license number, passport number, or other similar identifiers. Business Identifiers include business name, email, physical address, phone number, and professional registration numbers.</p>	<p>We use this personal information to prepare, assist in preparing, or obtain or provide services in connection with the preparation of a tax return; to provide you with the products and services you specifically request or consent to and other uses or disclosures as you expressly consent to from time to time; or as required by law. We also collect this information to establish and maintain business relationships.</p>	<p>We collect this personal information from users who set up an account and who provide this information through use of our Services.</p>
<p><b>Personal records</b>, such as name, signature, Social Security number, address, telephone number, passport number, driver’s license or state identification card number, bank account number, credit card number, debit card number, or any other financial information. Some personal information included in this category may overlap with other categories.</p> <p>Personal records include the categories of personal information described in Cal. Civ. Code § 1798.80(e).</p>	<p>We use this personal information in accordance with applicable laws, such as to prepare, assist in preparing, or obtain or provide services in connection with the preparation of a tax return; to provide you with the products and services you specifically request or consent to and other uses or disclosures as you expressly consent to from time to time; or as required by law.</p>	<p>We collect this personal information from users who set up an account and who provide this information through use of our Services.</p>

<b>Category</b>	<b>Purpose</b>	<b>How We Collect</b>
<b>Protected classification characteristics</b> under law, such as age (40 years or older).	We use this personal information in accordance with applicable laws, such to provide you with the products and services you specifically request or consent to and other uses or disclosures as you expressly consent to from time to time; or as required by law.	We collect this personal information from users who set up an account and who provide this information through use of our Services.
<b>Commercial information</b> , such as records of products, property, or services purchased, obtained, or considered, or other purchasing or consuming histories or tendencies.	We use this personal information to provide tax-related services.	We collect this personal information through use of cookies and tracking technologies from visitors to the Site and from users who set up an account and use our Services.
<b>Internet or other similar network activity</b> , such as browsing history, search history, and information on interaction with a website, application, or advertisement.	We use this personal information to personalize or customize your experience and our products, develop new features or services, and to improve the overall quality of our product offerings.	We collect this personal information through use of cookies and tracking technologies from visitors to the Site and from users who set up an account and who provide this information through use of our Services.
<b>Geolocation data</b> , such as physical location.	We use this personal information to personalize or customize your experience and our products, develop new features or services, and improve the security and overall quality of our product offerings.	We collect this personal information from visitors to the Site, users who set up an account and who provide this information through use of our Services.
<b>Professional or employment-related information</b> , such as role or title and current or past job history.	We use this personal information to provide tax-related services.	We collect this personal information from users who set up an account and who provide this information through use of our Services.

Drake obtains the categories of personal information listed above from the following categories of sources:

- **Directly from you** – For example, from forms you complete or products and services you purchase, when you set up an account for our Services, or when you contact us directly.
- **Automatically when you access Our Services** – For example, Drake uses cookies and other online tracking technologies to collect data when you visit our Site (see [Cookies, Tracking Technologies, and Interest-Based Advertising](#) section below).
- **Other parties** – For example, we may receive personal information from vendors who provide us with IT services, advertising services, or help facilitate our sales.

## **How We Use Your Personal Information**

We may use or disclose the personal information we collect in the categories above for one or more of the following business purposes:

- To provide our Services, including to prepare or assist in preparing tax returns, as described further below.
- To provide, support, personalize, and develop our Services, including to analyze and improve our Services, better understand the functionality of our Services, or provide a customized or personalized experience.
- To create, maintain, customize, and secure your account with us.
- To communicate with you, including to send marketing messages or to show you advertising, to notify you of new or enhanced products or services, and provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses.
- To personalize your experience and to deliver content, product and service offerings relevant to your interests, including targeted offers and ads through our Services or third-party sites, and via email or text message (with your consent, where required by law).
- To help maintain the safety, security, and integrity of our Services, databases and other technology assets, and business.
- To address issues that may arise, including notifying you of any issues with our Services, monitor and investigate fraud, identity theft, and other illegal activity, or protect the safety and security of Drake, our Services, our customers, and others.
- For research, analysis, and product development, including to develop and improve our Services.
- To operate our business, including, as necessary, for internal administrative purposes, recordkeeping and auditing, risk management, and to manage our relationships.
- To protect and secure our business, including preventing, investigating, identifying, or taking any other action with regard to suspected or actual fraudulent or illegal activity, or any other activity that violates or may violate applicable laws, regulations, legal processes, or our policies.
- To fulfill our legal obligations, including complying with applicable laws, regulations, or legal processes, as well as industry standards and our company policies; responding to law enforcement requests and as otherwise required by applicable law, court order, or governmental regulations.
- As described to you when collecting your personal information.
- To evaluate or conduct a merger, divestiture, restructuring, reorganization, dissolution, or other

sale or transfer of some or all of Drake's assets, whether as a going concern or as part of bankruptcy, liquidation, or similar proceeding, in which personal information held by Drake about users of our Services is among the assets transferred.

## **How and Why We Disclose Your Personal Information**

Drake may disclose personal information in the following ways:

- **As You Direct** – We disclose your personal information, including information regarding tax returns, in accordance with your requests, such as when you direct us to file a tax return with the IRS or to a state taxing authority or you provide your express consent to disclose information to a third party offering its own product or service.
- **Vendors Supporting Services** – To vendors, consultants, and service providers who assist us in providing our Services and use and disclose such personal information to perform services on our behalf.
- **Co-sponsors and Partners** – To promotional co-sponsors or other Drake partners as part of joint marketing efforts and other partnership activities.
- **Marketing Vendors** – To companies, including our affiliated entities and third parties, that provide services that help us market our products or otherwise support the promotion of our business.
- **Legal Compliance, Law Enforcement, and Regulatory Requests** – For compliance, enforcement, and public safety purposes, including, to taxing authorities, law enforcement, government agencies, and other parties to comply with any applicable law, regulation, or legal process, such as subpoenas and court orders; to carry out investigations; to protect and defend our rights and property or the rights or safety of other parties; for crime-prevention purposes; or as otherwise required by any applicable law, rule, or regulation.
- **Fraud and Abuse Prevention** – If we believe your actions are inconsistent with the spirit or language of our user agreements or policies, or to protect the rights, property, and safety of Drake or others.
- **In a Merger** – In connection with, or during negotiations of, any merger, sale of company assets, financing, or acquisition of all or a portion of our business by another company.
- **For Use by Our Affiliates** – For our affiliated companies to assist in providing and maintaining our Services or for other permitted business. You can learn more about and access the privacy notice of our affiliates at [TaxAct's Privacy Notice](#).

## **Tax Return Information**

If you decide to prepare or file a tax return using Our Services, we collect personal information, such as (“**Tax Return Information**”):

- Name;
- Social Security Number;
- Driver’s license number;
- Employment information;
- Spouse and dependent information;
- Income;
- Deductions; or

- Any other information included in your return.

We use Tax Return Information you provide us in order to prepare a tax return. The use and disclosure of Tax Return Information is governed by Section 7216 of the Internal Revenue Code and many state codes and their associated regulations. We use your Tax Return Information only in accordance with applicable laws, including Section 7216 of the Internal Revenue Code, for the following purposes:

- To prepare or assist in the preparation of tax returns;
- To allow tax professionals to assist you with questions or tax preparation;
- To obtain, manage, or market services in connection with the preparation of tax returns;
- To provide you with our tax preparation products and services, or, if you expressly consent, other products or services;
- For other uses or disclosures as you expressly consent to from time to time; or
- As required by law.

## **Cookies, Tracking Technologies, and Interest-Based Advertising**

We, or our vendors, may use tracking technologies, such as cookies, web beacons, pixels, or similar technologies (collectively, “**Cookies**”) to collect information when you interact with the Site. We may use Cookies for several purposes, including:

- Storing information to help the Sites function properly;
- Helping you access and navigate the Sites more efficiently;
- Recognizing your login information and preferences, so that you do not need to enter the information each time you visit the Sites;
- Analyzing your use of the Sites, including, collecting information about which pages on our Sites you viewed or links you clicked and how you interacted with our content during your visit or over multiple visits;
- Customizing your browsing experience by showing you information more likely to be relevant to you; and
- Delivering and customizing advertisements and tracking advertising campaigns.

We may receive reports based on the use of Cookies on an individual as well as aggregated basis.

We use certain web analytics services, such Google Analytics, to help us understand and analyze how visitors use Our Services. We use this information to implement Google advertising features such as dynamic remarketing, interest-based advertising, audience targeting, behavioral reporting, demographics and interests reporting, user segment analysis, device reporting, display advertising, video ads reporting, and impression reporting.

We, or our vendors, may collect personal information about your online activities over time and across different devices and online websites when you access Our Services. We, and our vendors, may combine information collected through Cookies with other information we collect about you.

If you have questions about our use of cookie or other similar technologies, please contact us at [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com).

## Your Cookie Choices

You may elect to opt out of certain processing of your personal information through Cookies by interacting with the Cookie Banner on our Site or clicking the “Do Not Sell or Share My Personal Information” link in the footer of any of the Site’s pages and toggling your preferences. You may be able to opt out of the use of certain Cookies using the settings on your browser or mobile device. In addition, some of the vendors we work with offer tools that you can use to limit or opt out of their Cookies:

- **Google Ads, Analytics** – For more information on how Google Analytics uses data collected through our Services, visit: [policies.google.com/technologies/partner-sites](https://policies.google.com/technologies/partner-sites). To opt out of Google Analytics, visit: [tools.google.com/dlpage/gaoptout](https://tools.google.com/dlpage/gaoptout). To control Google Ads, visit [adssettings.google.com](https://adssettings.google.com).
- **Microsoft** – For information on how Microsoft collects or receives personal information through tracking technologies to provide Microsoft Advertising, view the Microsoft Privacy Statements at [privacy.microsoft.com/en-us/privacystatement](https://privacy.microsoft.com/en-us/privacystatement).

In addition, you may opt out of certain interest-based ads through the following consumer choice mechanisms:

- Digital Advertising Alliance (DAA)’s self-regulatory opt-out page ([aboutads.info/choices](https://aboutads.info/choices)) and mobile application-based “AppChoices” download page ([youradchoices.com](https://youradchoices.com) | [AppChoices](https://appchoices.com)).
- Network Advertising Initiative (NAI)’s self-regulatory opt-out page ([optout.networkadvertising.org](https://optout.networkadvertising.org)).

Users may be able to control the use of Cookies at the individual browser level. If you reject Cookies, you may still use the Site, but your ability to use some features or areas of our Services may be limited.

Certain web browsers allow users to opt out of tracking by websites and online services by enabling an opt-out preference signal such as Do Not Track (“DNT”) or Global Privacy Control (“GPC”). To learn more about DNT signals, visit [allaboutdnt.com](https://allaboutdnt.com). If you choose to enable an opt-out preference signal on your browser, the Sites are optimized to recognize this opt-out preference, and you will need to enable this feature in each browser you use.

Please note opting out of interest-based advertising does not opt you out of being served ads and opting out via one browser, device, or app may not necessarily opt you out of collection from all browsers, devices, or apps. Even if you opt out of interest-based ads you may still receive non-personalized, contextual ads.

## How We Safeguard Your Personal Information

Drake maintains reasonable and appropriate administrative, technical, and physical safeguards that are designed to safeguard your personal information from loss, misuse, unauthorized access, disclosure, alteration, or destruction. The safety and security of your information also depends on you. Where you have chosen a username and password to access your account and certain parts of our Services, you are responsible for keeping this password confidential.

No method of transmission over the Internet, or method of electronic storage, is 100% secure. Although we do our best to protect your personal information, we cannot guarantee the security of information

transmitted to our Services. Additional details on our security measures can be found [here](#).

## **Children**

Our Services are not targeted at children under the age of 13. If we learn we have collected personal information from a child under 13, we will delete that information in accordance with applicable law.

## **Generative Artificial Intelligence, Machine Learning, and Related Tools**

We may use generative artificial intelligence, machine learning, or related tools, such as chatbots (“AI”) to improve, develop, and deliver our products and services. We may use AI to analyze how our Services are used and interacted with, or to process certain content our customers send or display through the Services, including by conducting data analytics to develop insights about your use of the Services, needs, and preferences, so we can make more informed predictions, recommendations, and improve our products and Services. When utilizing AI technology, we will provide additional notice and the opportunity to opt out, when appropriate. We will not use AI to subject you to decisions based solely on automated decision making that have a significant impact on you without providing additional notice, as appropriate.

## **Other Online Services**

- **Links to Other Websites** – Our Services include links to external websites whose privacy practices may differ from those of Drake. If you submit personal information to any of those websites, your information is governed by their privacy policies. We encourage you to carefully read the Privacy Notice of any website you visit.
- **Interactive Features** – We may engage vendors to provide certain interactive features on our Site. Your use of these interactive features is voluntary, and we may retain the information that you submit through these features. For example, we may offer an interactive chat feature on our Site to answer questions and for other customer service purposes. When you participate in the interactive chat, either with a virtual or live agent, the contents of the chat may be captured and kept as a transcript. By using these features, you understand that our vendors may process the information obtained through the feature to provide the service on our behalf.
- **Social Media** – We may monitor and collect information from interactions with our social media accounts (such as Twitter and Facebook). Our Services include social media features, such as the Facebook “Like” button and widgets, the “share this” button, or interactive mini programs that run on our Site. If you interact with us on social media or use features such as plugins, widgets, or other tools made available by social media platforms or networks in connection with our Services, we may collect personal information that you disclose to us or that the social media platforms disclose to us. Your interactions with these social media features are governed by the Privacy Notice of the company providing the service.

## **Your Choices**

We offer our users certain choices related to their personal information. If you are a resident of California or Oregon, you may have additional rights under state law, which are provided below in the



sections entitled [Additional California Disclosures](#) and [Additional Oregon Disclosures](#).

We will not discriminate against you for choosing to exercise any of these privacy choices.

## **Cookies and Tracking Technologies**

For information about managing your Cookie preferences, please refer to the [Your Cookie Choices](#) section above.

## **“Do Not Sell or Share My Personal Information” List**

You may elect to add your name to our “Do Not Sell or Share My Personal Information” list by clicking [here](#) and selecting “Do Not Sell My Personal Information.”

## **Email Communications**

You may choose to stop receiving our newsletter or marketing emails by following the unsubscribe instructions included in these emails or by changing your account settings. If you choose to stop receiving our newsletter or marketing emails, we will continue to send you necessary service and transactional communications.

## **Access and Updates to Your Information**

To exercise Access and Individual Rights, to amend, delete and withdraw consent, customers with registered accounts can access and/or update account information by signing in. If you do not have an account, you may request to update inaccuracies in your personal information, or to have the information deleted. If you would like to make such a request, please click [here](#). To withdraw your consent, please visit <https://www.1040.com/contact-us>.

## **Additional California Disclosures**

This section supplements the information contained in the Privacy Notice above, and applies to visitors, users, and others who reside in the State of California (“**residents**,” “**consumers**,” or “**you**”). In the event of any conflict between this section and our Privacy Notice above, this section shall govern for California residents. We adopt this notice to comply with the California Consumer Privacy Act (“**CCPA**”) and other California privacy laws. Any terms defined in the CCPA have the same meaning when used in this Privacy Notice.

This California section does not apply to current and former employees/contractors. If you are an employee or current or former employee/contractor, a separate privacy notice will be provided to you in the course of your employment. If you are applicant, please review our [Applicant Privacy Notice](#). If you have any questions, please contact us using the information provided in the [Contact Information](#) section below.

Unless otherwise noted, the disclosures in this California section apply to our current practices, as well as our activities in the prior twelve (12) months.

## Personal Information We Collect from California Residents

We may collect information that identifies, relates to, describes, references, is capable of being associated with, or reasonably could be linked, directly or indirectly, with a specific individual, consumer, or personal device (“**Personal Information**”) and, for limited purposes, Sensitive Personal Information as described in the [Personal Information We Collect](#) section of our Privacy Notice above and the following chart, depending on your access to and/or use of Our Services:

Category	Purpose	How We Collect
<b>Sensory data</b> , such as audio, electronic, visual, or similar information.	We use this personal information to provide support and to improve the overall quality of Our Services.	We collect this personal information during the recording of customer service calls, in instances where we ask to share your screen to help resolve your inquiry, or where interactions with our service staff is conducted by video conferencing.
<b>Inferences</b> drawn from other Personal Information, such as profiles reflecting a person’s preferences, characteristics, psychological trends, predispositions, behavior, attitudes, intelligence, abilities, and aptitudes.	We use this personal information to provide, support, and improve Our Services.	We process inferences based on other information collected as part of marketing efforts.

The [Personal Information We Collect](#) section and the above chart also describe the Sensitive Personal Information we collect and the purpose for which it is collected.

Under California law, we collect the following Sensitive Personal Information from consumers: Social Security, driver’s license, state identification card, or passport number; account login, financial account, debit card, or credit card number in combination with any required security or access code, password, or credentials allowing access to an account; and citizenship and immigration status.

## Retention, Use, and Disclosure of Your Personal Information

We may use or disclose your Personal Information for the Business Purposes described in the [Personal Information We Collect](#), [How We Use Your Personal Information](#), and [How and Why We Disclose Your Personal Information](#) sections of our Privacy Notice above.

## ***Retention***

Drake maintains the Personal Information described above for as long as it is needed for business, tax, or legal purposes described in this Privacy Notice or otherwise authorized by law. We set our retention periods based on the type of personal information collected, how long the Personal Information is needed to complete the business purpose and provide our Services and whether the business is subject to contractual or legal obligations, such as ongoing litigation, mandatory data retention laws or government orders to preserve data relevant to an investigation. This generally means holding the information for as long as one of the following apply:

- Your Personal Information is reasonably necessary to manage our operations, to manage your relationship with us, to provide goods or services, or to satisfy another purpose for which we collect the information;
- Your Personal Information is reasonably necessary to carry out a disclosed purposes that is reasonably compatible with the context in which the Personal Information was collected;
- The Personal Information is reasonably required to protect or defend our rights or property (which will generally relate to applicable laws that limit actions in a particular case); or
- We are otherwise required or permitted to keep your Personal Information by applicable laws or regulations.

Where Personal Information is used for more than one purpose, we will retain it until the purpose with the latest period expires. For more information about our retention policies, please contact us using the contact details above.

## ***Disclosures of Personal Information for a Business Purpose***

In the preceding twelve (12) months, Drake may have disclosed the following categories of Personal Information of certain users of our Services for a business purpose:

- Identifiers;
- Personal records;
- Protected classification characteristics under law;
- Commercial information;
- Internet or other similar network activity;;
- Geolocation data;
- Sensory data;
- Inferences drawn from other Personal Information; and
- Sensitive Personal Information.

We may disclose your Personal Information for a business purpose to the following categories of parties:

- Service providers and contractors;
- Third parties in connection with products or services we provide to you; and
- Affiliates.

## ***Information Sold to or Shared with Third Parties***

Drake does not sell Personal Information for monetary value, however the CCPA defines “sale” broadly

to include any transfer of Personal Information to a third party for monetary or other valuable consideration, including the sharing of Personal Information with third parties for cross-context behavioral advertising purposes.

As described in the [Cookies, Tracking Technologies, and Interest-Based Advertising](#) section above, we utilize interest-based advertising services from vendors on our Site. When you interact with our Site, some of your Personal Information may be shared with certain of these vendors who may use it for online or “cross-context” behavioral advertising, which meets the definition(s) of “share” and/or “sale” under the CCPA. You have the right to opt out of the “sale” or “sharing” of your Personal Information, as detailed below. We do not have actual knowledge that we sell or share the Personal Information of consumers under 16 years of age.

The following categories of Personal Information may be sold or shared for marketing and advertising purposes to third parties, including our affiliates, advertisers and marketing partners, data analytics providers, data aggregators, and social media networks:

- Identifiers;
- Commercial information;
- Internet or other similar network activity;
- Geolocation data; and
- Inferences drawn from other Personal Information.

## **California Privacy Rights**

California residents are provided with certain rights regarding their Personal Information under California law. For requests received directly from a California resident, this section describes your rights and explains how to exercise those rights.

### ***Access Right***

You have the right to request certain information about our collection and use of your Personal Information over the past 12 months by clicking [here](#). Once we receive and confirm your verifiable consumer request, we will disclose to you:

- The categories of Personal Information we collected about you.
- The categories of sources for the Personal Information we collected about you.
- Our business or commercial purpose for collecting, selling, or sharing that Personal Information.
- The categories of third parties with whom we share that Personal Information.
- The categories of Personal Information that we disclosed for a business purpose, and for each category identified, the categories of recipients to which we disclosed that particular category of Personal Information.
- The categories of Personal Information that we sold or shared, and for each category identified, the categories of recipients to which we sold or shared that particular category of Personal Information.
- The specific pieces of Personal Information we collected about you.

### ***Deletion Request Right***

You may request that Drake delete your Personal Information that we collected from you and retained, subject to certain exceptions, by clicking [here](#). Once we receive and confirm your verifiable consumer request, we will delete (and direct our service providers to delete) your Personal Information from our records, unless an exception applies.

### ***Correction Request Right***

You may request that Drake correct certain inaccurate or incomplete Personal Information we have about you by clicking [here](#). Once we receive and confirm your verifiable request, we will provide a response that may include self-service tools that enable you to update your Personal Information, unless an exception applies.

### ***Opt Out of Sale or Sharing of Personal Information Right***

You may opt out of the sale or sharing of your Personal Information to third parties using Cookies, including for cross-context behavioral advertising, by clicking the button labeled “Do Not Sell or Share My Personal Information” in the footer of any Drake Site page.

You have the right to direct us to not share or sell your Personal Information with third parties. You may elect to add your name to our “Do Not Sell or Share My Personal Information” list by clicking [here](#) and selecting “Do Not Sell My Personal Information.”

Certain web browsers allow users to opt out of tracking by websites and online services by enabling an opt-out preference signal, such as Global Privacy Control. If you choose to enable an opt-out preference signal, you will only be opted out of online sales or sharing of your information and will need to turn it on for each browser you use.

### ***Limitation on Use of Sensitive Personal Information Right***

We do not use or disclose Sensitive Personal Information for purposes to which the right to limit use and disclosure applies under the CCPA.

### **Request Submissions**

To exercise rights under the CCPA, please submit a consumer request by completing the online form linked [here](#). If you have any questions about this process, including regarding requests we are unable to fulfill, you may contact us at the information provided in the [Contact Information](#) section. If you submit certain requests, we may request additional information to verify your identity, which may require you to log into your account or to provide 2-3 pieces of Personal Information that we will match against our records. We will use Personal Information provided in a verifiable consumer request to verify the requestor's identity or authority to make the request.

Requests may also be submitted by a person registered with the California Secretary of State that is authorized to act on your behalf. Such privacy rights requests may have to undergo our verification process, which includes verifying the identity of the agent and their authorization to make the request. An authorized agent may submit a request on your behalf using the online form linked [here](#). These

requests must:

- Provide sufficient information that allows us to reasonably verify you are the person about whom we collected Personal Information or an authorized representative.
- Describe your request with sufficient detail that allows us to properly understand, evaluate, and respond to it.

We cannot respond to your request or provide you with Personal Information if we cannot verify your identity or authority to make the request and confirm the Personal Information relates to you.

## **Response Format**

If you have an account with us, we will deliver our written response to that account. If you do not have an account with us, we will deliver our written response using the contact information you have provided electronically.

## **Fees**

We do not charge a fee to process or respond to your verifiable consumer request unless it is excessive, repetitive, or manifestly unfounded. If we determine that the request warrants a fee, we will tell you why we made that decision and provide you with a cost estimate before completing your request.

## **Non-Discrimination**

We will not discriminate against you for exercising any of your CCPA rights or rights granted to you under other applicable law.

Please note, that certain information is required to effectively use our Services. For example, if you exercise the right to delete your information your account will be deactivated, which prevents the use of our goods and services. This in no way prevents you from creating a new account in the future.

## **No Financial Incentive**

We do not offer any financial incentives or price or service differences in an attempt to influence a consumer's decision whether or not to exercise a right afforded to the consumer under California law.

## **California "Shine the Light" Law**

Once per calendar year, a California resident may opt out of disclosure of their Personal Information to other parties, including affiliates, for their direct marketing purposes during the immediately preceding calendar year. If you do not want Drake to disclose your Personal Information to other companies for their marketing purposes, please request that [here](#) by selecting the "Do not Sell My Personal Information" button, or contact us at [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com).

## **Additional Oregon Disclosures**

This section supplements the information contained in the Privacy Notice above, and applies to visitors, users, and others who reside in the State of Oregon ("residents," "consumers," or "you"). In the event

of any conflict between this section and our Privacy Notice above, this section shall govern for Oregon residents. We adopt this section of the Privacy Notice to comply with the Oregon Consumer Privacy Act (“**OCPA**”). Any terms defined in the OCPA have the same meaning when used in this Privacy Notice.

Drake Software is the Controller of your Personal Information.

This Oregon section does not apply to job applicants or current and former employees/contractors. If you have any questions, please contact us using the information provided above.

## Personal Information We Collect from Oregon Residents

We may collect data, derived data, and unique identifiers that are linked to or reasonably linkable to a consumer or to a device that identifies, is linked to, or is reasonably linkable to one or more consumers in a household (“**Personal Information**”) and, for limited purposes, Sensitive Personal Information, as described in the [Personal Information We Collect](#) section of our Privacy Notice above and this section, depending on your access to and/or use of Our Services:

Category	Purpose	How We Collect
<b>Sensory data</b> , such as audio, electronic, visual, or similar information.	We use this personal information to provide support and to improve the overall quality of Our Services.	We collect this personal information during the recording of customer service calls, in instances where we ask to share your screen to help resolve your inquiry, or where interactions with our service staff is conducted by video conferencing.

The [Personal Information We Collect](#) section also describes the Sensitive Personal Information we collect and the purpose for which it is collected.

Under Oregon law, we collect the following Sensitive Personal Information from consumers: citizenship and immigration status.

## Use and Disclosure of Your Personal Information

We may use or disclose your Personal Information as described in the [Personal Information We Collect](#), [How We Use Your Personal Information](#), and [How and Why We Disclose Your Personal Information](#) sections of our Privacy Notice above.

Under the OCPA, a “sale” of Personal Information does not necessarily involve one party purchasing Personal Information from the other or an exchange of money. Instead, “sales” also include disclosures of Personal Information to Third Parties for valuable consideration. As described in the [Cookies, Tracking Technologies, and Interest-Based Advertising](#) section above, we utilize interest-based advertising services from vendors on our Sites. When you interact with our Sites, some of your Personal Information may be shared, if legally permitted, with certain of these vendors who may use it for targeted

advertising. You have the right to opt out of the “sale” of your Personal Information and targeted advertising, as detailed below. Personal Information may be sold or shared for marketing and advertising purposes to third parties, including our affiliates, advertisers and marketing partners, data analytics providers, data aggregators, and social media networks.

## **Oregon Privacy Rights**

Oregon residents are provided with certain rights regarding their Personal Information under the OCPA. For requests received from an Oregon resident, this section describes your rights and explains how to exercise those rights.

### ***Access and Data Portability Right***

You have the right to request that we confirm whether we are processing or have processed Personal Information about you and a copy of such Personal Information in a portable format. You may also request a list of third parties to which we disclosed Personal Information. You may exercise these rights by clicking [here](#).

### ***Deletion Request Right***

You have the right to request that Drake delete your Personal Information that we collected about you and retained, subject to certain exceptions, by clicking [here](#). Once we receive and confirm your verifiable consumer request, we will delete (and, where applicable, direct our processors to delete) your Personal Information from our records, unless an exception applies.

### ***Correction Request Right***

You have the right to request that Drake correct certain inaccurate or incomplete Personal Information we have about you by clicking [here](#). Once we receive and confirm your verifiable request, we will provide a response that may include self-service tools that enable you to update your Personal Information, unless an exception applies.

### ***Opt Out of Sale or Targeted Advertising Right***

You may opt out of targeted advertising or the sale of your Personal Information to third parties using Cookies, by clicking the button labeled “Do Not Sell or Share My Personal Information” in the footer of any Drake Site page.

You have the right to direct us to not process your Personal Information for targeted advertising or sell your Personal Information to third parties. You may elect to add your name to our “Do Not Sell or Share My Personal Information” list by clicking [here](#) and selecting “Do Not Sell My Personal Information.”

Certain web browsers allow users to opt out of tracking by websites and online services by enabling an opt-out preference signal, such as Global Privacy Control. If you choose to enable an opt-out preference signal, you will only be opted out of online targeted advertising of sales of your Personal Information and will need to turn it on for each browser you use.



## ***Opt Out of Profiling Right***

We do not Profile consumers in furtherance of decisions that produce legal effects or effects of similar significance.

## ***Appeal Right***

If we deny or are unable to fulfill your OCPA privacy rights request, and you believe we denied it in error, you may appeal for reconsideration of your request by emailing us at [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com).

## **Request Submissions**

To exercise rights under the OCPA, please submit a consumer request by completing the online form linked [here](#). If you have any questions about this process, including regarding requests we are unable to fulfill, you may contact us at the information provided in the [Contact Information](#) section. If you submit certain requests, we may request additional information to verify your identity, which may require you to log into your account or to provide 2-3 pieces of Personal Information that we will match against our records. We will use Personal Information provided in a verifiable consumer request to verify the requestor's identity or authority to make the request.

Requests may also be submitted by an agent authorized to act on your behalf. Such privacy rights requests may have to undergo our verification process, which includes verifying the identity of the agent and their authorization to make the request. An authorized agent may submit a request on your behalf using the online form linked [here](#). These requests must:

- Provide sufficient information that allows us to reasonably verify you are the person about whom we collected Personal Information or an authorized representative.
- Describe your request with sufficient detail that allows us to properly understand, evaluate, and respond to it.

We cannot respond to your request or provide you with Personal Information if we cannot verify your identity or authority to make the request and confirm the Personal Information relates to you.

## **Response Format**

If you have an account with us, we will deliver our written response to that account. If you do not have an account with us, we will deliver our written response using the contact information you have provided electronically.

## **Non-Discrimination**

We will not discriminate against you for exercising any of your OCPA rights. Please note, that certain information is required to effectively use Our Services. For example, if you exercise the right to delete your information your account will be deactivated, which prevents the use of our goods and services. This in no way prevents you from creating a new account in the future.

## **Data Storage and Transfer**

In accordance with applicable laws, we keep and store your personal information to provide you with Our Services and for the uses identified in this Privacy Notice.

Our Services are intended for access and use in the United States. Any information Drake collects about you may be stored, transferred, processed, and/or accessed by us in the United States, or to the extent permitted by law, any other country where we or our vendors operate. Please know that personal information may be transferred to, and maintained on, computers not in the state or country where you live, meaning the privacy laws could differ from and may not be as protective as those where you live.

If you are located outside the United States and allow us to collect personal information about you, please be aware that Drake may, where permitted by law, transfer your personal information to the United States, and process and store it there. By allowing collection of your personal information, you consent to having your personal data transferred to, processed, and stored in the United States.

## **Notice of Changes**

We may change this Privacy Notice from time to time. If we make updates, we will revise the “Last Updated” date at the top of this Privacy Notice and, in some cases, we may provide you with additional notice at our discretion. We encourage you to periodically review the Privacy Notice whenever you access the Sites, use our Services, or otherwise interact with us to stay informed about our information practices.

## **Accessibility**

Drake is committed to making our Privacy Notice accessible to individuals with disabilities. If you use assistive technology (such as a Braille reader, a screen reader, text-enlargement programs, etc.) and the format of the Privacy Notice interferes with your ability to access any information in the Privacy Notice, please contact us at [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com). Please indicate the nature of your accessibility problem, the preferred format you would like to receive the Privacy Notice, and your contact information so that we may respond in a manner that is helpful for you.

## **Contact Information**

If you have questions or comments regarding this Privacy Notice, contact us by writing or emailing at the address below:

Address: Drake Software  
Attn: Legal  
235 East Palmer St.  
Franklin, NC 28734

Email: [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com)