

FACTS

WHAT DOES DRAKE SOFTWARE, LLC d/b/a 1040.com ("DRAKE") DO WITH YOUR PERSONAL INFORMATION?

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Why?

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and transaction history
- account balances and payment history
- tax return information

How?

All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Drake chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Drake share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	Yes
For joint marketing with other financial companies	No	We do not share
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share

Questions?

Visit us at www.1040.com/privacy
Email us at privacy@drakesoftware.com

Who we are

Who is providing this notice?

This notice is provided by Drake Software, LLC d/b/a 1040.com.

What we do

How does Drake protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

How does Drake collect my personal information?

We collect your personal information, for example, when you

- register for an account or purchase our products and services
- provide us your information directly when interacting with our website and services

We also collect your personal information from others, such as our affiliates or other third-party service providers.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness.
- affiliates from using your information to market to you.
- sharing for nonaffiliates to market to you.

State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account—unless you tell us otherwise.

Definitions

Affiliates

Companies related by common ownership or control. They can be financial and nonfinancial companies.

Nonaffiliates

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- *Nonaffiliates with which we share personal information include service providers that perform services or functions on our behalf. We do not share with nonaffiliates so they can market to you except with your consent.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Other important information

For California Customers: In accordance with California law, we will not share information we collect about California residents with nonaffiliates, unless the law allows. For example, we may share information with your consent, and to provide our products and services to you. We limit sharing your information to the extent required by California law.