Privacy Policy

4impactdata ("Company," "we," "us," and "our") provides a decision intelligence platform that gives CPA firms clear visibility across their entire book of business. This Privacy Policy is designed to help you understand how we collect, use, and share personal information and to help you understand and exercise your privacy rights.

Last updated: October 2, 2026

Scope

This Privacy Policy applies to personal information processed by us, including on our website, platform, and other online or offline offerings. To make this Privacy Policy easier to read, our website, products and solutions, and other offerings are collectively called "Services".

An Important Note: This Privacy Policy does not apply to any of the personal information that our customers may process using our platform ("Customer Data"). Our customers' respective privacy policies govern the collection and use of Customer Data. Our processing of Customer Data is governed by the contracts that we have in place with our customers, not this Privacy Policy. If you are a client of our customer of the Services through our customer, please direct any questions or requests relating to Customer Data to our customer.

For clarity, Company is a controller for the personal information we collect from customers in order to market, service, and provide access to and use of the Services. For Customer Data that is entered into the Services, the customer is the controller and we act as a processor or service provider (as defined under applicable laws) and will only process Customer Data as agreed to provide Services under our Terms of Service [https://4impactdata.com/policies/4id-saas-agreement/] or other contract with a customer. NO PERSONAL INFORMATION IS COLLECTED BY THE SERVICES AS PART OF CUSTOMER DATA. **The Services (and personal information collected in connection with the Services) are intended for business use and not for any personal, family, or household purposes.**

Personal Information We Collect

The categories of personal information we collect depend on how you interact with us, our Services and the requirements of applicable law. We collect information that you provide to us, information we obtain automatically when you use our Services, and information from other sources such as third-party services and organizations, as described below.

Information You Provide to Us Directly

We may collect the following personal information that you provide to us.

- **Account Creation**. We may collect information when you create an account, such as a unique customer ID or an email address or phone number.
- **Your Communications with Us.** We may collect personal information, such as email address, phone number, or mailing address when you request information about our Services, register for our newsletter, request customer or technical support, apply for a job or otherwise communicate with us.
- **Business Development and Strategic Partnerships.** We may collect personal information from individuals and third parties to assess and pursue potential business opportunities.
- **Job Applications.** We may post job openings and opportunities on our Services. If you reply to one of these postings by submitting your application, resume, and/or cover letter to us, we will collect and use your information to assess your qualifications.

  NOTE: No personal information of clients of customers is collected by the platform when you use the Services.

Information Collected Automatically

We may collect personal information automatically when you use our Services:

- **Automatic Data Collection When You Visit Our Website**. We may collect certain information automatically when you use our Services, such as your Internet protocol (IP) address, user settings, MAC address, cookie identifiers, mobile carrier, mobile advertising and other unique identifiers, browser or device information, location information

(including approximate location derived from IP address), and Internet service provider. We may also automatically collect information regarding your use of our Services, such as pages that you visit before, during and after using our Services, information about the links you click, the types of content you interact with, the frequency and duration of your activities, and other information about how you use our Services.

- **Automatic Data Collection When You Use Our Services**. We may collect other types of technical information about your use of our Services. None of this technical information is connected with your personal information or Customer Data and is only used to improve our Services.
- **Cookies, Pixel Tags/Web Beacons, and Other Technologies.** We, as well as third parties that provide content, or other functionality on our Services, may use cookies, pixel tags, local storage, and other technologies ("Technologies") to automatically collect information through your use of our Services. Please also see our cookie management dashboard by clicking "Cookie Manager" in the footer.
- **Cookies.** Cookies are small text files placed in device browsers that store preferences and facilitate and enhance your experience.
- **Pixel Tags/Web Beacons.** A pixel tag (also known as a web beacon) is a piece of code embedded in our Services that collects information about engagement on our Services. The use of a pixel tag allows us to record, for example, that a user has visited a particular web page or clicked on a particular advertisement. We may also include web beacons in e-mails to understand whether messages have been opened, acted on, or forwarded. Our uses of these Technologies fall into the following general categories:
- **Essential.** This includes Technologies that allow you access to our Services, applications, and tools that are required to identify irregular website behavior, prevent fraudulent activity and improve security or that allow you to make use of our functionality;
- **Marketing and Analytics.** We may use Technologies to assess the performance of our Services, including as part of our analytic practices to help us understand how individuals use our Services (see Analytics below); and
- **Advertising.** We may use Technologies that allow us to offer you enhanced functionality when accessing or using our Services. This may include identifying you when you sign into our Services or keeping track

of your specified preferences, interests, or past items viewed. See Section 5 below to understand your choices regarding these Technologies.

- **Analytics**. We may use Technologies and other third-party tools to process analytics information on our Services, such as Google Analytics. For more information, please visit Google Analytics' Privacy Policy. To learn more about how to opt-out of Google Analytics' use of your information, please click here.
- **Social Media Platforms.** Our Services may contain social media buttons such as LinkedIn and Twitter (that might include widgets such as the "share this" button or other interactive mini programs). These features may collect your IP address, which page you are visiting on our Services, and may set a cookie to enable the feature to function properly. Your interactions with these platforms are governed by the privacy policy of the company providing it.

Information Collected from Other Sources

We may obtain information about you from other sources, including through third-party services and organizations. For example, if you access our Services through a social networking site, we may collect information about you from that third-party application that you have made available via your privacy settings.

How we use your information

We use your information for a variety of business purposes, including to provide our Services, for administrative purposes, and to market our products and Services, as described below.

Provide Our Services

We use your information to fulfill our contract with you and provide you with our Services, such as:

- Managing your information and accounts;
- Providing access to certain areas, functionalities, and features of our Services;
- Answering requests for customer or technical support;
- Communicating with you about your account, activities on our Services, and policy changes;

- Processing applications if you apply for a job, we post on our Services; and
- Allowing you to register for events.

Administrative Purposes
We use your information for various administrative purposes, such as:

- Pursuing our legitimate interests such as direct marketing, research and development (including marketing research), network and information security, and fraud prevention;
- Detecting security incidents, protecting against malicious, deceptive, fraudulent or illegal activity, and prosecuting those responsible for that activity;
- Measuring interest and engagement in our Services;
- Improving, upgrading or enhancing our Services;
- Developing new products and Services;
- Ensuring internal quality control and safety;
- Authenticating and verifying individual identities;
- Debugging to identify and repair errors with our Services;
- Auditing relating to interactions, transactions and other compliance activities;
- Enforcing our agreements and policies; and
- Complying with our legal obligations.

Marketing and Advertising our Products and Services
We may use personal information to tailor and provide you with content and advertisements. We may provide you with these materials as permitted by applicable law.

Some of the ways we market to you include email campaigns.
If you have any questions about our marketing practices or if you would like to opt out of the use of your personal information for marketing purposes, you may contact us at any time as set forth below.

Other Purposes
We also use your information for other purposes as requested by you or as permitted by applicable law.

- **Consent.** We may use personal information for other purposes that are clearly disclosed to you at the time you provide personal information or with your consent.
- **De-identified and Aggregated Information**. We may use personal information and other information about you to create de-identified and/or aggregated information, such as de-identified demographic information, de-identified location information, information about the device from which you access our Services, or other analyses we create.

How we disclose your information

We disclose your information to third parties for a variety of business purposes, including to provide our Services, to protect us or others, or in the event of a major business transaction such as a merger, sale, or asset transfer, as described below.

Disclosures to Provide our Services

The categories of third parties with whom we may share your information are described below.

- **Service Providers**. We may share your personal information with our third-party service providers who use that information to help us provide our Services. This includes service providers that provide us with IT support, hosting, payment processing, customer service, SMS authentication, and related services.
- **Business Partners.** We may share your personal information with business partners to provide you with a product or service you have requested. We may also share your personal information to business partners with whom we jointly offer products or services.
- **Advertising Partners**. We may share your personal information with third-party advertising partners. These third-party advertising partners may set Technologies and other tracking tools on our Services to collect information regarding your activities and your device (e.g., your IP address, cookie identifiers, page(s) visited, location, time of day). These advertising partners may use this information (and similar information collected from other services) for purposes of delivering personalized advertisements to you when you visit digital properties within their

networks. This practice is commonly referred to as "interest-based advertising" or "personalized advertising."

- **AI Chatbot.** We use an artificial intelligence ("AI") chatbot powered by a third party service provider on our website to provide information, answer questions, and assist with your interactions with us. The chatbot may process information you provide through your conversations with it, including the content of your messages and any personal information you choose to provide. Please do not provide sensitive personal information, including financial information, passwords, Social Security numbers, health information, or other information you would not want processed by an AI system. We use third-party AI service providers to operate or support the chatbot. These providers may process information submitted through the chatbot on our behalf and are contractually restricted in their use of that information as required by applicable law and our agreements. AI-generated responses may not always be accurate, complete, or appropriate for your circumstances. The chatbot is provided for informational and assistance purposes and should not be relied upon as a substitute for professional advice.
  If you do not wish to interact with the AI chatbot, you may choose not to use it and instead use other available methods of contacting us.

Disclosures to Protect Us or Others

We may access, preserve, and disclose any information we store associated with you or your account to external parties if we, in good faith, believe doing so is required or appropriate to: comply with law enforcement or national security requests and legal process, such as a court order or subpoena; protect your, our, or others' rights, property, or safety; enforce our policies or contracts; collect amounts owed to us; or assist with an investigation or prosecution of suspected or actual illegal activity.

Disclosure in the Event of Merger, Sale, or Other Asset Transfers

If we are involved in a merger, acquisition, financing due diligence, reorganization, bankruptcy, receivership, purchase or sale of assets, or transition of service to another provider, your information may be sold or transferred as part of such a transaction, as permitted by law and/or contract.

Your privacy choices and rights

State Privacy Rights. The Company is not currently subject to certain state comprehensive privacy laws and does not represent that it is voluntarily subject to those laws or that individuals are entitled to the rights provided by those laws. Nevertheless, as a matter of policy, we will endeavor to honor requests to exercise certain privacy rights, including requests to access, correct, or delete personal information or to opt out of certain uses or disclosures. We will evaluate each request based on the circumstances and applicable law.

Your Privacy Choices. The privacy choices you may have about your personal information are determined by applicable law and are described below.

- **Email Communications**. If you receive an unwanted email from us, you can use the unsubscribe link found at the bottom of the email to opt out of receiving future emails. Note that you will continue to receive transaction-related emails regarding products or Services you have requested. We may also send you certain non-promotional communications regarding us and our Services, and you will not be able to opt out of those communications (e.g., communications regarding our Services or updates to our Terms or this Privacy Policy). We process requests to be placed on do-not-mail, do-not-phone, and do-not-contact lists as required by applicable law.
- "Do Not Track." Do Not Track ("DNT") is a privacy preference that users can set in certain web browsers. Please note that we do not respond to or honor DNT signals or similar mechanisms transmitted by web browsers.
- **Cookies and Interest-Based Advertising.** You may stop or restrict the placement of Technologies on your device or remove them by adjusting your preferences as your browser or device permits. However, if you adjust your preferences, our Services may not work properly. Please note that cookie-based opt-outs are not effective on mobile applications. However, you may opt-out of personalized advertisements on some mobile applications by following the instructions for Android, iOS and others. You may also access our cookie management dashboard by clicking "Cookie Manager" in the footer for cookie management options.
- The online advertising industry also provides websites from which you may opt out of receiving targeted ads from data partners and other advertising partners that participate in self-regulatory programs. You

can access these and learn more about targeted advertising and consumer choice and privacy by visiting the Network Advertising Initiative and the Digital Advertising Alliance.
- Please note you must separately opt out in each browser and on each device.

Your Privacy Rights. In accordance with applicable law, you may have the right to:
- **Access to** personal information we have collected about you;
- **Request Correction** of your personal information where it is inaccurate or incomplete. In some cases, we may provide self-service tools that enable you to update your personal information;
- **Request Deletion** of your personal information;
- **Request Restriction of or Object** to our processing of your personal information; and
- **Withdraw your Consent** to our processing of your personal information.

If you would like to exercise any of these rights, please contact us as set forth below. We will process such requests in accordance with applicable laws.

Security of your information
We take steps to ensure that your information is treated securely and in accordance with this Privacy Policy. Unfortunately, no system is 100% secure, and we cannot ensure or warrant the security of any information you provide to us. We have taken appropriate safeguards to require that your personal information will remain protected and require our third-party service providers and partners to have appropriate safeguards as well. To the fullest extent permitted by applicable law, we do not accept liability for unauthorized disclosure. For information regarding our security measures, please see our Trust Center.

By using our Services or providing personal information to us, you agree that we may communicate with you electronically regarding security, privacy, and administrative issues relating to your use of our Services. If we learn of a security system's breach, we may attempt to notify you electronically by posting a notice on our Services, by mail or by sending an email to you.

United States use only

The Services are intended for use within the United States. If you access the website outside the United States, certain information as described in this Privacy Policy may be collected and processed within the United States.

We store the personal information we collect as described in this Privacy Policy for as long as you use our Services or as necessary to fulfill the purpose(s) for which it was collected, provide our Services, resolve disputes, establish legal defenses, conduct audits, pursue legitimate business purposes, enforce our agreements, and comply with applicable laws.

Children's information
Our Services are not intended for use by children. We do not knowingly attempt to solicit or collect personal information from children.

Other provisions

Third-Party Websites/Applications. The Services may contain links to other websites/applications and other websites/applications may reference or link to our Services. These third-party services are not controlled by us. We encourage our users to read the privacy policies of each website and application with which they interact. We do not endorse, screen or approve, and are not responsible for, the privacy practices or content of such other websites or applications. Providing personal information to third-party websites or applications is at your own risk.

Changes to our Privacy Policy. We may revise this Privacy Policy from time to time in our sole discretion. If there are any material changes to this Privacy Policy, we will notify you as required by applicable law. You understand and agree that you will be deemed to have accepted the updated Privacy Policy if you continue to use our Services after the new Privacy Policy takes effect.

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

support@4impactdata.com