

# Taxwell Applicant Privacy Notice

Effective July 31, 2025

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This Applicant Privacy Notice (“**Privacy Notice**”) describes the practices of DS Admiral Bidco, LLC, dba Taxwell, and its affiliated companies, including Drake Software and TaxAct (collectively referred to as “**Taxwell**”) regarding the collection of personal information about individuals who participate in our job application and recruitment process (“**Applicants**”), including through our careers website at <https://taxwell.wd1.myworkdayjobs.com/taxwell> (“**Site**”).

We may update this Privacy Notice from time to time, in which case the revised Privacy Notice will be posted to the Site.

## Personal Information We Collect

Below are the categories of personal information we may collect about Applicants:

- **Identifying information**, such as your full name, date of birth, and signature.
- **Government identifiers**, such as Social Security number (SSN); driver’s license, state identification card or passport number; and visa information.
- **Demographic data**, such as gender, race, ethnic origin, marital status, disability status, citizenship or immigration status, and veteran or military status.
- **Contact information**, such as home address, telephone numbers, and email address.
- **Educational and professional background**, such as work history, academic and professional qualifications, educational records, references, and interview notes.
- **Financial information**, such as financial information used for reimbursements.
- **Health and safety information**, such as health conditions (if relevant to the recruitment process), accommodation requirements, and job restrictions.
- **Information Systems (IS) information**, such as your search history, browsing history, login information, and IP addresses when accessing the Site.
- **Sensory or surveillance information**, such as temperature checks and video surveillance in Taxwell’s facilities.
- **Profile or summary information** about an Applicant’s preferences, characteristics, attitudes, intelligence, abilities, and aptitudes.

## How We Use and Disclose Personal Information

Taxwell uses and discloses personal information to:

- **Recruit and evaluate job applicants and candidates for employment, including to:**
  - open and maintain your application records;
  - assess your eligibility for employment;
  - communicate with you regarding your application;
  - manage the recruitment process;
  - facilitate your use of the Site, improve the Site, set default options, and provide you with a better application experience; and
  - conduct background and reference checks in accordance with law.
- **Maintain security and privacy, including to:**
  - manage and monitor Applicant access to Taxwell facilities, equipment, and systems, including the Site;
  - conduct internal audits and investigations; and
  - investigate and enforce compliance with and potential breaches of Taxwell policies and procedures.
- **Maintain business operations, including to:**
  - engage in corporate transactions, such as potential mergers and acquisitions;
  - operate our business;
  - perform workforce analytics, data analytics, and benchmarking;
  - administer and maintain Taxwell's operations, including for safety purposes;
  - comply with applicable laws and regulations;
  - detect and prevent fraud against you and/or us; and
  - exercise or defend the legal rights of Taxwell and its employees.

We may disclose your personal information for the purposes described above to our affiliated and related companies; our service providers, vendors, and suppliers; our professional advisors; public authorities or government bodies; and external auditors.

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

We may use generative artificial intelligence, machine learning, or related tools, such as chatbots (collectively, "AI") to evaluate certain personal aspects relating to your interests, reliability, or behavior. 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.

## How We Safeguard Personal Information

We work to safeguard your personal information from loss, misuse, or unauthorized access, alteration, and destruction by using industry standard safeguards, procedures, and practices.

These safeguards include physical, logical, and technical protections for physical security, information security, and additional measures to restrict access to data we hold in physical and electronic forms.

No method of transmission over the internet, or method of electronic storage, is completely secure. Although we do our best to protect your personal information, we cannot guarantee the security of information transmitted through the Site or as part of the recruitment process.

## Additional California Disclosures

This section supplements the information contained in the Privacy Notice above and applies solely to Applicants who reside in the State of California (“**California Applicants**,” or “**you**”). In the event of any conflict between this section and our Privacy Notice above, this section shall govern for California Applicants. We adopt this section of the Privacy 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.

If you interact with one of Taxwell’s affiliated companies as a consumer, you can find the applicable affiliated company privacy notice at:

- TaxAct: [TaxAct's Privacy Notice](#)
- Drake Software: [Drake Software Privacy Notice](#)

As used in this section, the term “**Personal Information**” means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with you and, for limited purposes, sensitive Personal Information as described below. Personal Information does not include information that is publicly available, de-identified, or aggregated.

The disclosures in this section that describe how and why we collect, use, and disclose Personal Information also describe how we have collected, used, and disclosed Personal Information in the preceding 12 months.

## Personal Information We Collect, Use, and Disclose From California Applicants

We may collect Personal Information, including certain sensitive Personal Information, about California Applicants as set out in the following chart. Personal Information we collect about you may vary depending on the nature of your interactions with us and may not include all of the examples listed below. We may use or disclose your Personal Information for the Business Purposes described in the [How We Use and Disclose Personal Information](#) section of this Privacy Notice above.

| Category of Personal Information                                                                                                                                                                                                                                                        | Categories of Sources from which Collected                                                                                                                                                                               | Purposes                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Identifiers</b> including real name, alias, postal address, unique personal identifier, online identifier, IP address, email address, account name, Social Security number, driver's license number, state identification card number, passport number, or other similar identifiers | <ul style="list-style-type: none"> <li>• Directly from you</li> <li>• Automatically when you use our website</li> <li>• From service providers that help us to run our business</li> <li>• From third parties</li> </ul> | <ul style="list-style-type: none"> <li>• To open and maintain your application records</li> <li>• To assess your eligibility for employment</li> <li>• To communicate with you regarding your application</li> <li>• To comply with applicable laws and regulations</li> <li>• To manage the security of our premises and systems</li> <li>• To detect and prevent fraud against you and/or us</li> </ul> |

| Category of Personal Information                                                                                                                                                             | Categories of Sources from which Collected                                                                                                                  | Purposes                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Personal Information described in Cal. Civ. Code § 1798.80(e)</b> , including name, signature, address, telephone number, education, employment, and employment history                   | <ul style="list-style-type: none"> <li>• Directly from you From service providers that help us to run our business</li> <li>• From third parties</li> </ul> | <ul style="list-style-type: none"> <li>• To open and maintain your application records</li> <li>• To assess your eligibility for employment</li> <li>• To communicate with you regarding your application</li> <li>• To comply with applicable laws and regulations</li> <li>• To manage the security of our premises and systems</li> <li>• To detect and prevent fraud against you and/or us</li> </ul> |
| <b>Characteristics of protected classifications</b> under California or federal law, including race, ancestry, ethnic origin, citizenship and immigration status, sex, gender, or disability | <ul style="list-style-type: none"> <li>• Directly from you</li> <li>• From service providers that help us to run our business</li> </ul>                    | <ul style="list-style-type: none"> <li>• To comply with applicable laws and regulations</li> </ul>                                                                                                                                                                                                                                                                                                        |

| Category of Personal Information                                                                                                                                                                              | Categories of Sources from which Collected                                                                                                                                            | Purposes                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Internet or other electronic network activity information</b> , including browsing history, search history, and information regarding your interactions with our websites, applications, or advertisements | <ul style="list-style-type: none"> <li>Automatically when you use our website</li> <li>From service providers that help us to run our business</li> <li>From third parties</li> </ul> | <ul style="list-style-type: none"> <li>To facilitate your use of our website</li> <li>To improve our website, set default options, and provide you with a better application experience</li> <li>To protect the security of our website</li> <li>To detect and prevent fraud against you and/or us</li> </ul> |
| <b>Geolocation data</b> , including location data inferred from your device IP address                                                                                                                        | <ul style="list-style-type: none"> <li>Automatically when you use our website</li> <li>From service providers that help us to run our business</li> <li>From third parties</li> </ul> | <ul style="list-style-type: none"> <li>To improve our website, set default options, and provide you with a better application experience</li> <li>To protect the security of our website</li> <li>To detect and prevent fraud against you and/or us</li> </ul>                                                |
| <b>Audio, electronic, visual, or similar information</b> , including closed-circuit images, photographs and video of you, and as may relate to your application                                               | <ul style="list-style-type: none"> <li>Directly from you</li> <li>Automatically while you are on our property</li> </ul>                                                              | <ul style="list-style-type: none"> <li>To manage the security of our premises and systems</li> <li>To carry out video interviews</li> </ul>                                                                                                                                                                   |

| Category of Personal Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Categories of Sources from which Collected                                                                                                                             | Purposes                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Professional or employment-related information</b>, including:<br/>Skills, qualifications, work experience, references, recommendations, and other information included in a resume, CV, application form, or cover letter</p> <p>Answers to behavioral or other screening questions in an application or interview Information contained in any personal webpages or documents you choose to share with us</p> <p>Information relating to professional licenses, training, and membership in professional organizations</p> | <ul style="list-style-type: none"> <li>• Directly from you</li> <li>• From service providers that help us to run our business</li> <li>• From third parties</li> </ul> | <ul style="list-style-type: none"> <li>• To open and maintain your application records</li> <li>• To assess your eligibility for employment</li> <li>• To comply with applicable laws and regulations</li> <li>• To detect and prevent fraud against you and/or us</li> </ul> |
| <p><b>Non-public education information</b>, including school(s) attended and dates of attendance, and other information relating to your secondary and post- secondary education</p>                                                                                                                                                                                                                                                                                                                                               | <ul style="list-style-type: none"> <li>• Directly from you</li> <li>• From service providers that help us to run our business</li> <li>• From third parties</li> </ul> | <ul style="list-style-type: none"> <li>• To open and maintain your application records</li> <li>• To assess your eligibility for employment</li> <li>• To comply with applicable laws and regulations</li> </ul>                                                              |
| <p><b>Inferences</b> used to create a profile reflecting your, behavior, attitudes, intelligence, abilities, and aptitudes</p>                                                                                                                                                                                                                                                                                                                                                                                                     | <ul style="list-style-type: none"> <li>• Drawn from the other categories of Personal Information we collect</li> </ul>                                                 | <ul style="list-style-type: none"> <li>• To assess your eligibility for employment</li> <li>• To manage the security of our premises and systems</li> <li>• To detect and prevent fraud against you and/or us</li> </ul>                                                      |

Under the CCPA, we collect the following sensitive Personal Information about California Applicants: race and ethnic origin; citizenship and immigration status; Social Security, driver’s license, state identification card, or passport number; and health information.

## Retention

We keep the categories of Personal Information described above for as long as is necessary for the purposes described in this Privacy Notice or otherwise authorized by law. This generally means holding the Personal Information for as long as one of the following apply:

- The Personal Information is reasonably necessary to manage our operations, to manage your relationship with us, or to satisfy another purpose for which we collected the information;
- The Personal Information is reasonably necessary to carry out a disclosed purpose 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 the 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 below.

## Submitting Requests Relating to California Privacy Rights

If you are a California Applicant, you have the right to submit certain requests relating to your Personal Information as described below. To exercise any of these rights, please submit a request by completing the applicable online form. For TaxAct please go to [TaxAct Privacy Web Form \(onetrust.com\)](https://onetrust.com/TaxAct-Privacy-Web-Form). For Drake Software please go to [Drake Software Privacy Web Form \(onetrust.com\)](https://onetrust.com/Drake-Software-Privacy-Web-Form).

Please note that, if you submit a request to access, request to delete, or request to correct, you may be asked to provide certain Personal Information that we will match against our records to verify your identity.

A verifiable request may be submitted by a California Applicant or a person registered with the California Secretary of State that is authorized to act on your behalf. These requests must:

- Detail sufficient information that allows us to reasonably verify you are the person about whom we collected Personal Information or an authorized representative; and
- 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. We will only use Personal Information provided in a verifiable consumer request to verify the requestor's identity or authority to make the request.

## California Privacy Rights

California Applicants are provided with certain rights regarding their Personal Information under California law. For requests received directly from a California Applicant, this section describes your rights.

**Access to Specific Information and Data Portability Rights.** You have the right to request that we disclose certain information to you about our collection and use of your Personal Information over the past 12 months. Once we receive and confirm your verifiable consumer request, you may request we 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 that Personal Information and how long we keep your information.

- The categories of recipients to whom we disclose 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 specific pieces of Personal Information we collected about you.

**Right to Delete Personal Information.** You have the right to request that we delete Personal Information we collected from you, subject to certain exceptions.

**Right to Correct Inaccurate Information.** If you believe that Personal Information we maintain about you is inaccurate, you have the right to request that we correct that information.

**Right to Opt Out of Sales and Sharing of Personal Information.** We do not sell or share California Applicant Personal Information as those terms are defined under the CCPA. For this reason, we do not offer a way for you to submit such a request. If you visit our website as a consumer, please visit the privacy notice on the applicable website for information about our selling and sharing of consumer Personal Information.

**Right to Limit Use and Disclosure of Sensitive Personal Information.** We do not use or disclose sensitive Personal Information for purposes to which the right to limit use and disclosure applies under the CCPA. For this reason, we do not offer a way for you to submit such a request.

**Right to Non-Discrimination for the Exercise of Your Privacy Rights.** If you choose to exercise any of your privacy rights under the CCPA, you also have the right not to receive discriminatory treatment by us, including retaliation against you as an employee, job applicant, or independent contractor.

## Accessibility

Taxwell 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, and text-enlargement programs) and the format of the Privacy Notice interferes with your ability to access any information in the Privacy Notice, please contact us at [privacy@taxact.com](mailto:privacy@taxact.com) or [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com) or see the [How to Contact Us](#) section below. 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. 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.

## How to Contact Us

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

### Our postal address:

**Drake Software**  
111 Technology Drive  
Franklin, NC 28734

or

**TaxAct**  
3200 Olympus Blvd, Suite 150  
Dallas, Texas 75019

### Other ways to reach us:

**Email:** [privacy@taxact.com](mailto:privacy@taxact.com), [privacy@drakesoftware.com](mailto:privacy@drakesoftware.com), or [HR@taxwell.com](mailto:HR@taxwell.com).