

# Taxwell Employee Privacy Notice

Effective July 31, 2025

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This 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 and processing of employee, owner, director, officer, and contractor (“**Employees**”) personal information related to employment by Taxwell.

We may update this Privacy Notice from time to time, in which case the revised Privacy Notice will be posted to our intranet or provided to you in writing, by email.

## Personal Information We Collect

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

- **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; visa information; and license plate numbers.
- **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.
- **Employment details**, such as job title, position, hire date, compensation, performance and disciplinary records, and vacation and sick leave records.
- **Financial information**, such as banking details, tax information, payroll information, and withholdings.
- **Commercial information**, including information collected for reimbursements, employee discount programs, and other records of personal property, or products or services obtained.
- **Health and safety information**, such as health conditions (if relevant to your employment), accommodation requirements, job restrictions, workplace illness and injury information, and health insurance policy information.
- **Biometric information**, such as digital photographs used for identification.

- **Information Systems (IS) information**, such as your search history, browsing history, login information, and IP addresses on Taxwell's information systems and networks.
- **Geolocation data on Taxwell-connected devices**, such as time and physical location related to use of an internet website, application, device, or physical access to a Taxwell office location.
- **Sensory or surveillance information**, such as temperature checks, call monitoring, and video surveillance in Taxwell's facilities.
- **Profile or summary information** about an Employee's preferences, characteristics, attitudes, intelligence, abilities, and aptitudes.

If you provide another person's personal information to Taxwell, such as your spouse or dependent, you are responsible for informing such individuals about the details of this Notice; ensuring that you have the right and/or authority to provide such personal information to us; and obtaining consent from such persons (if consent is required).

## How We Use and Disclose Personal Information

Taxwell uses and discloses personal information to:

- **Manage your employment relationship with us, including to:**
  - perform onboarding processes;
  - administer timekeeping, payroll, and expense reports;
  - administer benefits, including access to company vehicles and employee discount programs;
  - manage training and development;
  - create, maintain, and safeguard your online Employee accounts;
  - reach your emergency contacts when needed, such as when you are not reachable or are injured or ill;
  - manage workers' compensation claims; and
  - evaluate Employee job performance, including goals and performance reviews, promotions, discipline, and termination.
- **Maintain security and privacy, including to:**
  - manage and monitor employee access to Taxwell facilities, equipment, and systems;
  - conduct internal audits and workplace 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 by or of Taxwell;
  - 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 performance at work, economic situation, health, personal preferences, interests, reliability, behavior, location, or movements. 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 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.

## Additional State Disclosures

### Connecticut, Delaware, and New York

Employees in Connecticut, Delaware, and New York should be advised that any and all telephone conversations or transmissions, electronic mail or transmissions, or internet access or usage by an Employee by any electronic device or system, including but not limited to the use of a computer, telephone, wire, radio or electromagnetic, camera, photoelectronic, or photo-optical systems may be subject to monitoring at any and all times and by any lawful means.

### California

This section supplements the information contained in the Privacy Notice above and applies solely to Employees who reside in the State of California (“**California Employees**” 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 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 From California Employees

We may collect Personal Information, including certain sensitive Personal Information, about our California Employees 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 for Collection/Use
<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, passport number, or other similar identifiers	<ul style="list-style-type: none"> <li>• Directly from you</li> <li>• Automatically when you use our electronic systems</li> <li>• Created by us (e.g., your username and Company email address)</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 communicate with you</li> <li>• To manage your employment relationship with us</li> <li>• To assess your eligibility for employment</li> <li>• To onboard and enroll you as an employee</li> <li>• To provide compensation and benefits</li> <li>• To comply with applicable laws and regulations</li> <li>• To manage corporate information technology</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 for Collection/Use
<p><b>Personal Information described in Cal. Civ. Code § 1798.80(e)</b>, including name; signature; Social Security number; address; telephone number; passport number; driver's license or state identification card number; education; employment; employment history; bank account number; financial information; medical information; health information; health insurance information; or 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</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 benefits providers</li> <li>• From third parties</li> </ul>	<ul style="list-style-type: none"> <li>• To communicate with you</li> <li>• To manage your employment relationship with us</li> <li>• To manage job duties and operate our business</li> <li>• To assess your eligibility for employment</li> <li>• To onboard and enroll you as an employee</li> <li>• To provide compensation and benefits</li> <li>• To comply with applicable laws and regulations</li> <li>• To manage corporate information technology</li> <li>• To support our recruitment and diversity, equity, and inclusion programs and initiatives</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 for Collection/Use
<p><b>Characteristics of protected classifications</b> under California or federal law, including age and date of birth, marital status, race, ethnic origin, citizenship and immigration status, religious or philosophical beliefs, gender, sexual orientation, military or veteran status, medical condition, or disability</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 benefits providers</li> <li>• From third parties</li> </ul>	<ul style="list-style-type: none"> <li>• To comply with applicable laws and regulations</li> <li>• To support our recruitment and diversity, equity, and inclusion programs and initiatives</li> </ul>
<p><b>Commercial information</b>, including records of personal property; products or services purchased, obtained, or considered; or other purchasing or consuming histories or tendencies, including products purchased through our employee discount program</p>	<ul style="list-style-type: none"> <li>• Direct 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 provide you with products in our employee discount program</li> <li>• To arrange business-related travel and manage travel and expense programs</li> <li>• To reimburse you for personal expenses paid (e.g., meals, mileage) for Taxwell business</li> </ul>

Category of Personal Information	Categories of Sources from which Collected	Purposes for Collection/Use
<b>Internet or other electronic network activity information</b> , including browsing history, search history, and information regarding your interactions with our websites, applications, or systems	<ul style="list-style-type: none"> <li>Automatically when you use our electronic systems</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 manage corporate information technology</li> <li>To manage the security of our premises and systems</li> <li>To allow you to perform job functions</li> <li>To detect and prevent fraud against you and/or us</li> </ul>
<b>Geolocation data</b> , including access- control data based on employee badge swipes and location data inferred from your device IP address	<ul style="list-style-type: none"> <li>Directly from you</li> <li>Automatically when you use our electronic systems</li> <li>From service providers that help us to run our business</li> </ul>	<ul style="list-style-type: none"> <li>To manage corporate information technology</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>Audio, electronic, visual, or similar information</b> , including closed-circuit images, photographs and video of you (e.g., for ID badges, marketing materials), and audio recordings as may relate to your job functions	<ul style="list-style-type: none"> <li>Directly from you</li> <li>Automatically while you are on Taxwell property or using certain Taxwell devices (e.g., if you answer or place phone calls on a recorded line)</li> </ul>	<ul style="list-style-type: none"> <li>To manage the security of our premises and systems</li> <li>To manage job duties, evaluate performance, and operate our business</li> </ul>

Category of Personal Information	Categories of Sources from which Collected	Purposes for Collection/Use
<p><b>Professional or employment-related information</b>, including: Employee profile information (employee status, organization information, performance and talent information, employment background, functional experience, leadership experience, honors or awards, timesheets, education, training, professional certifications, evaluations, developmental planning, career interests and development information, and other talent management and team- based assessments)</p> <p>Compensation, payroll, and benefits information</p> <p>Medical, parental, family, vacation, and other leave and associated records, including details of the types of and reasons for leave being taken, duration of leave, and leave-related correspondence</p> <p>Company vehicle information, such as vehicle data, including information about the vehicle, its components, and its parts (e.g., VIN, hardware model, parts numbers, version numbers, technical specifications), information about the status and performance of the vehicle, its components, and its parts (e.g., odometer, tire pressure, fuel and fluid levels, batter level, lock status), and diagnostic information about how the vehicle and its systems are performing (e.g., trouble codes, warning indicators, and alerts); and vehicle service and accident history (e.g., visit details, service details, service or repair history)</p> <p>Any termination of employment documentation, including resignation letters, dismissal letters, minutes of meetings, settlement agreements, and related correspondence</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 manage your employment relationship with us</li> <li>• To manage job duties, evaluate performance, and operate our business</li> <li>• To provide compensation and benefits</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>
<p><b>Non-public education information</b>, including school(s) attended, grades, transcripts, records of attendance, disciplinary records, 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 manage your employment relationship with us</li> <li>• To onboard and enroll you as an employee</li> </ul>



Category of Personal Information	Categories of Sources from which Collected	Purposes for Collection/Use
<b>Inferences</b> used to create a profile reflecting your preferences, characteristics, behavior, attitudes, intelligence, abilities, and aptitudes	<ul style="list-style-type: none"> <li>• Drawn from other Personal Information we collect</li> </ul>	<ul style="list-style-type: none"> <li>• To manage job duties, evaluate performance, and operate our business</li> <li>• To manage corporate information technology</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 Employees: Social security, driver's license, state identification card, and 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; precise geolocation (location within a radius of 1,850 feet); race; ethnic origin; religious or philosophical beliefs; citizenship and immigration status; sexual orientation; 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.

## Requests Relating to California Privacy Rights

California Employees 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) or you may submit your request via email to [HR@taxwell.com](mailto:HR@taxwell.com).

Please note that, if you submit a request to access, request to delete, or request to correct, you may be asked to log into your account or to provide basic Personal Information that we will match against our records to verify your identity. You may designate an authorized agent to make a request on your behalf; however, you will still need to

verify your identity directly with us before your request can be processed. An authorized agent may submit a request on your behalf using the applicable web form listed above.

## California Privacy Rights

California Employees are provided with certain rights regarding the Personal Information under California law. For requests received directly from a California Employee, 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 California Employee request, you may request we disclose to you:

- The categories of Personal Information we collected about you, including:
  - 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 with 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 Employee 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.

## 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.

## 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).