

SMS Terms/Conditions and Privacy Policy

Effective Date: 11-1-2023

Privacy Policy

Your information will be handled in accordance with our [Privacy Policy](#) (click the link)

SMS Messaging Service

By opting in to receive SMS messages or emails from LA Tax & Business Services, Inc (“we,” “us,” “our”), you agree to these Terms and Conditions (Terms).

By providing my phone number through our website form, I consent to receive SMS text messages from LA Tax & Business Services, Inc for appointment reminders, account identification, and general two-way communication about [tax prep or other services]. Message and Data Rates may apply.

Message Frequency

You may get more than one message from us unless you opt-out, and while messaging frequency varies, you will likely receive less than 4 messages per month depending on services needs or company announcements. LA Tax & Business Services, Inc reserves the right to alter the frequency of messages at any time to increase or decrease the total number of messages. LA Tax & Business Services, Inc and carriers are not liable for delays or undelivered messages.

Message and Data Rates

Message and data rates may apply based on your mobile carrier’s terms.

Cancellation/Opt-Out Instructions

You can opt out of receiving SMS messages or emails at any time by replying STOP to any message we send you. After you opt out of text messaging, you will receive one additional message confirming your request has been processed.

Help/Customer Support

Text the word HELP for support. You may also contact us directly at info@latax.biz or 321-594-2311.

Liability

We are not responsible for any charges, errors, or delays in SMS or emails delivery or undelivered messages caused by your carrier or third-party service providers.

SMS Messages and Third Parties

Your mobile or phone information will **not** be shared with third parties/affiliates for marketing/promotional purposes.

PRIVACY POLICY

LA Tax & Business Services, Inc does not share any personal information with any third party, other than software services company that are used by LA Tax & Business Services, Inc (in order to fulfill the processing of any service that we offer).

This LA Tax & Business Services, Inc Digital Privacy Notice (“Notice”) describes how LA Tax & Business Services, Inc uses personal information collected through:

- Our website and online and software tax preparation products and services;
- Our mobile applications that incorporate this Notice.

Information We Collect

We collect information about you in a variety of ways depending on how you interact with us and our online and software tax preparation products and services including:

- Directly from you when you provide it to us upon initial communications, sign up to receive communications from us via, text, email or our website, request information or services from us, post information in publicly accessible blogs or community forums that may be offered on our websites, or contact us by phone, email, or otherwise.
- From other sources, including, for example, our tax software affiliates, government entities (e.g., the IRS) or other select service providers as directed you. For example, if you submit a job application, or become an employee, we may conduct a background check.

The following provides examples of the type of information that we collect and how we may use that information. If you choose not to provide certain information we request, we may be unable to serve you as our products, services, calculators, and/or other tools may rely upon this information.

Context	Types of Personal Information	Primary Purpose for Collection and Use of Personal Information
General Contact Information In Order to Establish a	We collect your name, email address, username, password, and other contact information when you create an account or	We collect this information to set up your account, provide account-related functionalities to

Service Relationship	<p>request service from us. We also collect information relating to the actions that you perform while logged into your account and information from documents you choose to give us or upload to us.</p>	<p>you, and authenticate your identity when you request certain services from us. We may use your email address as your username. We may access documents you add to your account to assist you with products or services you have chosen or as requested by you.</p>
Tax Preparation Products and Services	<p>We may collect information about you, your spouse, your dependents, other individuals, or your business when you use our tax preparation products and services. This information may include contact information (e.g., name, phone number, and email address), Social Security Number and other government identification numbers (e.g., EIN, Driver's License Number, and ITIN), date of birth, financial information (e.g., income, revenue, assets, credits,</p>	<p>We collect this information to deliver the products and services you request, including as part of preparing your tax return, electronically filing your tax return, and applying for or purchasing a product or service. We also collect some of this information because the Internal Revenue Service ("IRS") or state taxing</p>

	<p>deductions, expenses, and bank account information), payment information (e.g., checking, debit, and credit card account numbers, balances, assets, and payment history), health information (e.g., health insurance status and financial information related to payment for healthcare services), unique device identifiers, biometric information (e.g., faceprint), and Internet Protocol (“IP”) address (a number that is automatically assigned to a computer when the internet is used).</p>	<p>authorities may require that we collect personal and system information (such as name, Social Security Number, IP address and device identifiers) in connection with preparing or electronically filing your tax return. To improve the security of our services and to protect your information, we may verify your personal information by matching the information you provide against other publicly available information that we obtain from identification verification companies and operations of our business.</p>
<p>Cookies and Similar Web Technologies</p>	<p>When strictly needed to perform our services to you, we use, and allow third parties to use, technologies, such as cookies, pixels, media</p>	<p>We use web technologies for a variety of reasons, including to better manage content on our websites,</p>

tags, and similar web technologies (collectively, “web technologies”). Web technologies may collect certain types of information when you interact with our websites, mobile applications, and online products and services. For example, they may collect data about your interactions with our website, device, browser, operating system, and/or it may store or transmit identifiers that are unique to you or your browser.

to help us understand usage patterns, track your preferences and understand your interests, fix issues, improve our products and services, remember you, and personalize your online experience.

We or third parties working on our behalf use web technologies to report analytics to us or provide advertising about products and services tailored to your interests. Some of these technologies might collect information over time and across different websites in order to serve ads on our website or on other websites (“behavioral advertising”). You may opt-out of the use of web technologies on our site for the purpose of

		behavioral advertising by clicking Cookie Settings .
Calculators and Other Tools	When you use our calculators and other tools, we may collect the number of people who use a certain tool. Some calculators and other tools may require registration or ask for your contact information. We may also set cookies or clear GIFs based upon your use.	For our calculators and other tools that require registration or ask for your contact information, we may use the contact information you provide to contact you directly with relevant services and offers.
Send a Friend Program	If you choose to use one of our referral services, we may ask for your friend's/referral's name and contact information, including email address.	Depending on the particular referral service, we may contact your friend/referral and invite them to visit our website, sign up for services. Your friend/referral may request that we remove their information from our system by clicking .
Geolocation Information	When you use one of our websites or mobile applications, we may	We collect this information to understand our

	<p>collect your location from the GPS, Wi-Fi, and/or cellular technology in your device.</p>	<p>users and provide tailored services, including information regarding nearby LA Tax & Business Services, Inc offices. In some contexts, our use is also based upon your consent to provide us with geolocation information. You may revoke your consent to our collection of geolocation information from your mobile device by turning off location tracking at the device level and/or not using our office locator.</p>
<p>Email Interconnectivity</p>	<p>If you receive email from us, we use certain technologies, such as pixels, to capture data related to when you open our message or click on any links.</p>	<p>We collect this information to understand how you interact with our communications to you, including to gauge the effectiveness of our communications channels.</p>

Job Applicants	<p>If you apply for a job posting, or become an employee, we collect information necessary to process your application or to retain you as an employee. This may include, among other things, your Social Security Number. Providing this information is required for employment.</p>	<p>We use information about job applicants to review and process their applications for employment, including conducting a background check.</p>
Mobile Devices	<p>We collect information from your mobile device such as unique identifying information broadcast from your device (e.g., Apple IDFA and other general device characteristics and device IDs) when you visit our websites or use our mobile applications. Subject to your control, our mobile services may request permission to dial a phone number, access your camera or photo library, access the internet, access your calendar, send you push notifications or authorize in-app purchases.</p>	<p>We collect this information to track your appointments, enable you to upload documents to your MyBlock account, identify unique visitors to our websites and users of our mobile applications, and understand how website visitors and mobile app users interact with us on their mobile devices.</p>
Mobile Analytics	<p>We currently do not use any Mobile Analytics,</p>	<p>We collect this information to</p>

	<p>but should we start in the future, we use mobile analytics software that may record information such as how often you use our mobile applications, the events that occur within the application, aggregated usage data, performance data, and from where the application was downloaded.</p>	<p>better understand the functionality of our mobile software on your mobile device.</p>
<p>Product or Service Purchases</p>	<p>We collect your name, billing address, shipping address, email address, phone number, and payment information when you purchase a product or service.</p>	<p>We use your information to provide you with and process your payment for the products or services you purchase.</p>
<p>Surveys</p>	<p>When you participate in a survey or poll, we collect information that you provide through the survey or poll. If the survey or poll is provided by a third-party service provider, the third party's privacy policy applies to the collection, use, and disclosure of your information.</p>	<p>We collect this information to understand your opinions and compile information relevant to our organization.</p>

<p>Text Messaging Programs</p>	<p>You may choose to receive text messages from us. If you opt-in to one of our text message programs, we will collect your mobile telephone number.</p>	<p>We use your information to send different types of text messages depending on the text message program, such as refund status updates or promotional offers. Your mobile number, and the fact that you opted-in to receive text messages and consent will not be sold or shared with any third parties for their marketing purposes.</p>
<p>Website Interactions</p>	<p>We use technology to monitor how you interact with our websites. This may include how you arrived on our website, which pages you visit, which links you click on, your mouse movements, your scrolling activity, device type, browser type, operating system, language, screen resolution, referring URL, any unique identifier we may assign</p>	<p>We collect this information to understand how you interact with our websites to better improve them and our products and services, to understand your preferences and interests in order to select offerings that you might find most useful, and to otherwise</p>

	when you use our services, etc.	customize your experience with us and better serve you. We also collect this information to help detect and prevent fraud.
Web Logs	If any third party is required in order to implement our services to you, they may collect information, including your browser type, operating system, IP address, internet service provider, unique device ID, domain name, click-activity, referring website, and/or a date/time stamp when you use our services.	They collect this information to monitor our networks and the visitors to our websites and users of our mobile applications. Among other things, it helps us analyze trends, administer our websites and mobile applications, gather broad demographic information for aggregate use, and understand which of our services is the most popular. It also may be used for security or fraud detection purposes.

Recording or Generative AI Assistants	<p>To the extent that you interact with any generative AI assistants in our tax products or services, we will collect any content you choose to provide during such interactions. We maintain a record of questions submitted to recording or AI assist along with the corresponding information provided by you as answers. By leaving a recorded message, or responding to any AI Assistance questions, you consent to your sessions being recorded by us or our service providers for quality control and assessment purposes. Please note that the terms of use for recording or AI assistance include limitations on the types of information that may be used or that you may provide to us.</p>	<p>We use this information to communicate with you including responding to your questions, complaints, or comments. We, or our service providers, also may use this information for quality control and assessment purposes.</p>
Online Search Services	<p>When you use an online search service to contact us, they may collect certain information about you. For example, when you call us your telephone</p>	<p>We use this information for analytics purposes. The online search service's use is</p>

	number and the length of your call.	governed by their privacy policy.
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How We Use Information

In addition to the other purposes and uses described above, we may use information in the following ways, subject to applicable laws:

- To provide you with the products and services you request.
- To contact you about products and services offered by us.
- To service and report on your account.
- To provide customer and tax product support, including through the use of artificial intelligence.
- To identify you when you visit our websites or use our mobile applications.
- To improve our services and products.
- To communicate with you.
- To send promotional materials, including newsletters, publications, or other information relating to our products, services, sales, or promotions.
- To respond to individuals who are not using but may be interested in our products and services.
- To detect and protect against malicious, deceptive, fraudulent, or illegal activity, including violation of our policies and terms and conditions, security incidents, and harm to the rights, property, or safety of our company and our users, employees, or others, or to otherwise improve the security of our services.
- To debug, identify, and repair errors that impair existing intended functionality of our websites and services.

- To comply with our legal or regulatory obligations, to establish or exercise our rights, and to defend against a legal claim.
- For internal administrative purposes, as well as to manage our relationships.