

Tax Geaks Privacy Policy

Last Updated: January 1, 2026

Tax Geaks respects your privacy and is committed to protecting the personal information you share with us. This Privacy Policy (“Policy”) describes how Tax Geaks, including its affiliates and subsidiaries (“Tax Geaks,” “we,” “us,” or “our”), collects, uses, processes, stores, and discloses information obtained through our websites, online forms, scheduling tools, client portals, and related services (collectively, the “Services”).

This Policy applies to information that identifies, relates to, describes, or could reasonably be linked to an identifiable individual (“Personal Data”), as well as information that does not identify an individual (“Non-Personal Data”). To the extent we provide additional privacy notices for specific services, those notices will govern.

By accessing or using our Services, you acknowledge that you have read and understand this Policy and agree to the practices described herein.

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1. Personal Data We Collect

A. Personal Data You Provide Voluntarily

You may voluntarily provide Personal Data to Tax Geaks when you:

- Complete contact forms, intake forms, or questionnaires
- Submit information through LinkedIn, Meta, or other lead forms
- Schedule consultations or request services
- Communicate with us by email, phone, or other means
- Engage with our client portals or onboarding systems

Personal Data may include, but is not limited to:

- First and last name
- Email address
- Phone number
- Mailing address
- Business or firm name
- Professional title or role
- Business structure information
- Information related to tax and accounting needs
- Communications and correspondence

We do not request sensitive personal identifiers (such as Social Security numbers) through advertising or public-facing forms.

B. Personal Data Collected Automatically

When you use our Services, we may automatically collect certain information, including:

- Internet Protocol (IP) address
- Browser type and version
- Device type and operating system
- Date and time of access
- Pages viewed and interactions
- Referring URLs
- Advertising metrics and analytics data

This information helps us maintain security, improve functionality, and measure performance.

2. Sources of Personal Data

We collect Personal Data from:

- You directly
- Our websites and online tools

- Third-party platforms such as LinkedIn, Meta (Facebook/Instagram), Google, and Calendly
- Analytics and advertising providers
- Service providers supporting our operations

Information obtained from third parties is combined with information we collect directly, where permitted by law.

3. How We Use Personal Data

Tax Geaks uses Personal Data for legitimate business purposes, including:

- Providing tax preparation and accounting services
- Reviewing submitted information and determining service suitability
- Communicating regarding inquiries, consultations, and services
- Scheduling and managing appointments
- Improving our Services and user experience
- Conducting analytics and performance measurement
- Marketing and advertising our Services
- Preventing fraud and ensuring security
- Complying with legal, regulatory, and professional obligations

We do not sell Personal Data.

4. How We Disclose and Transfer Personal Data

We may disclose Personal Data under the following circumstances:

A. Service Providers

We may share information with trusted service providers that assist with:

- Website hosting (e.g., Wix)
- Scheduling and communications (e.g., Calendly, email providers)
- Analytics and advertising
- Payment processing
- Data storage and security

Service providers are contractually required to protect confidentiality and use Personal Data only for authorized purposes.

B. Legal and Regulatory Requirements

We may disclose Personal Data when required to:

- Comply with applicable laws or regulations
- Respond to subpoenas or lawful requests
- Protect the rights, property, or safety of Tax Geaks, clients, or others

C. Business Transfers

In the event of a merger, acquisition, restructuring, or sale of assets, Personal Data may be transferred as part of the transaction, subject to this Policy.

5. Data Security and Safeguards

We maintain reasonable administrative, technical, and physical safeguards designed to protect Personal Data from unauthorized access, disclosure, alteration, or destruction. While no system is completely secure, we continuously evaluate and improve our security practices.

6. Your Choices and Rights

You may:

- Request access to Personal Data we maintain
- Request correction or deletion of Personal Data
- Opt out of marketing communications
- Withdraw consent where applicable

Requests may be submitted by contacting info@taxgeaks.com. We will respond in accordance with applicable laws.

7. Retention of Personal Data

We retain Personal Data only for as long as reasonably necessary to:

- Provide Services
- Meet legal, regulatory, and professional obligations
- Resolve disputes
- Enforce agreements

Data may be retained longer where required by law.

8. Cookies, Web Beacons, and Tracking Technologies

We use cookies, pixels, web beacons, and similar technologies to:

- Operate and improve our Services
- Analyze usage patterns
- Measure advertising effectiveness
- Personalize content and ads

You may manage cookie preferences through your browser settings. Disabling cookies may affect functionality.

9. Advertising and Analytics

We may use third-party analytics and advertising tools, including LinkedIn, Meta, and Google, to:

- Measure ad performance
- Deliver relevant advertising
- Understand user engagement

These providers may use cookies or similar technologies subject to their own privacy policies.

10. Children's Privacy

Our Services are intended for adults and are not directed to individuals under the age of 18. We do not knowingly collect Personal Data from minors.

11. International Data Transfers

Our Services are operated in the United States. If you access the Services from outside the U.S., you consent to the transfer and processing of your information in the United States, where data protection laws may differ.

12. California Privacy Rights

California residents may have rights under the California Consumer Privacy Act (CCPA/CPRA), including rights to access, delete, or limit the use of Personal Data. Requests may be submitted to info@taxgeaks.com.

13. Changes to This Privacy Policy

We reserve the right to update this Policy at any time. Updates will be posted with a revised “Last Updated” date. Continued use of the Services constitutes acceptance of the revised Policy.

14. Contacting Us

If you have questions or concerns regarding this Privacy Policy or our data practices, please contact:

Tax Geaks
ATTN: Privacy Team
Email: info@taxgeaks.com