

Caliber Accounting Group Privacy Policy

Last updated: August 18, 2025

Thank you for taking the time to read Caliber Accounting Group's ("**Caliber**", "**we**", "**our**", or "**us**") privacy policy (the "**Privacy Policy**"). This Privacy Policy sets out how we collect, use, process, store, and disclose your personal information collected indirectly through links posted on www.calibercpas.com (the "**Website**") in providing consulting, accounting, tax planning and preparation, audit and attestation, and peer review services (collectively, the "**Services**"). By accessing and using our Services you freely and expressly consent to the collection, use, processing, storage, and disclosure of your personal information as set out in this Privacy Policy.

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1. PERSONAL INFORMATION WE COLLECT

When you use our Services, you may enable Caliber to collect various types of your personal information. Below, we provide a list of the commonly collected personal information. Please note, the list below is not exhaustive of all personal information and is intended to serve as a sample set.

- Contact information such as name, email address, phone number, mailing address, and other identity authentication data.
- Credit card information.
- Date of birth.
- Information about members of your family or household, including your spouse and dependents.
- Financial information such as employment and income information, bank account information, credit scores and credit history, payroll information, and tax return information associated with Internal Revenue Service and/or state tax filings.
- Username and passwords you used to create and access accounts and other information.

When necessary, with your consent or as otherwise permitted by applicable law, we may collect the following categories of sensitive personal information:

- Government identifiers such as social security numbers, driver's license, state identification, and passport information.

We may be authorized by you to collect select personal or historical information from federal or state agencies on your behalf.

2. HOW WE USE PERSONAL INFORMATION

We use the personal information we collect for the following purposes:

- To provide and improve our Services.
- To communicate with you.
- To process payments securely.
- For other business and legal purposes, such as collecting amounts owing to us and maintaining business records.

Our use or disclosure of customer information is governed by Section 7216 of the Internal Revenue Code and the Gramm Leach Bliley Act of 1999, and certain other laws, as well as our policies. Section 7216 of the Internal Revenue Code requires that we obtain your consent ("opt in") to certain disclosures and uses of information you provide us in connection with your tax return information.

At the time of tax preparation or tax resolution, we will further explain how we handle your tax return information or tax resolution information. Depending on the service you use, you may authorize us to use or share personal information about you with the following types of third parties: Financial service providers; non-affiliated third parties providing credit, insurance, financial planning, debt management, and others.

3. HOW WE DISCLOSE YOUR PERSONAL INFORMATION

We may disclose the personal information you provide to us to our service providers or affiliates so they can assist us in providing the services you request. By requesting information or utilizing our Services, you give us permission to transfer your personal information to these providers so they can fulfill our operations, including:

- Cloud-based accounting software providers.
- Communications such as through our email service provider.
- Payment processing.

In addition, we may disclose your personal information in order to:

- Protect the legal rights of our company, our employees, our agents, and our affiliates.

- Protect the safety and security of our customers.
- In certain situations, we may be required to disclose personal information in response to lawful requests by public authorities or regulatory governmental entities, including to meet law enforcement requirements or a court order, subpoena, or other judicial, administrative, or investigative proceedings.

We may disclose de-identified or anonymous information for any purpose. This means that the information we disclose does not include any identifying or personal information to protect your privacy.

4. YOUR PRIVACY CHOICES

We provide you with the following choices surrounding our use of your personal information:

- Access the personal information we maintain about you.
- Request that we delete the personal information we maintain about you. Please note we may be required by law or by our professional guidelines to retain certain information in compliance with accounting, tax or other legal obligations.
- Correct inaccurate personal information we maintain about you
- Opt out of certain uses of your personal information, based on your specific request. Please note we never sell your personal information, and we will not share your personal information without your prior express written consent.

You can exercise these rights by reaching out to the primary partner assigned to your engagement team or by contacting us at privacy@calibercpas.com

5. SECURITY

We protect information we collect about you by maintaining physical, electronic and procedural safeguards designed to prevent unauthorized access to user data retained in our servers; however, due to the inherent open nature of the Internet and the use of Cloud-based software providers, we cannot ensure or warrant the security of any information provided online. We take reasonable precautions to protect your information both online and offline. The servers on which we store data are kept in a secure environment.

6. RETENTION

We will retain your information for as long as your account is active or as needed to provide you with any requested services, and for a reasonable time thereafter in accordance with our standard procedures or as necessary to comply with our legal obligations and professional guidelines, to resolve disputes, and to enforce our agreements. Generally, we retain your engagement information for seven years, after which time it is destroyed.

7. CHILDREN'S PRIVACY

We do not intentionally collect any personal information directly from children under the age of 13. If we have collected any personal information related to children from a parent or guardian, they may utilize any of the privacy choices above to control our use of that information.

8. THIRD-PARTY LINKS

Our Website and Services may contain links to other websites or services. We do not exercise control over the information you provide or is collected by these third-party websites. We encourage you to read the privacy policies or statements of the other websites you visit.

9. CHANGES TO THIS PRIVACY POLICY

We may update this Privacy Policy from time to time. If we make material changes, we will post the updated Privacy Policy on this page with a 'Last Updated' effective date of the revisions. We encourage you to look for updates and changes to this Privacy Policy by checking this page when you access our Services.

10. CONTACT US

If you have any questions about our privacy or security practices, or if you would like to submit a privacy request, you can contact us by email at privacy@calibercpas.com or at:

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