Rev. January 2025

# FACTS WHAT DOES APRIL TAX SOLUTIONS INC. (“APRIL”) DO WITH YOUR PERSONAL INFORMATION?

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| **Why?** | Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do. |
| **What?** | The types of personal information we collect and share depend on the product or service you have with us. This information can include:<br>■ Social Security number and income<br>■ Employment information<br>■ Transaction history and assets<br>When you are *no longer* our customer, we continue to share your information as described in this notice. |
| **How?** | All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons April chooses to share; and whether you can limit this sharing. |

| Reasons we can share your personal information | Does April share? | Can you limit this sharing? |
|---|---|---|
| **For our everyday business purposes—** such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes | No |
| **For our marketing purposes—** to offer our products and services to you | Yes | No |
| **For joint marketing with other financial companies** | Yes | No |
| **For our affiliates’ everyday business purposes—** information about your transactions and experiences | No | We don't share |
| **For our affiliates’ everyday business purposes—** information about your creditworthiness | No | We don't share |
| **For nonaffiliates to market to you** | Only where you provide consent | Yes |

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| **Question** | Go to https://www.getapril.com/contact |

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| **Who we are** | |
| **Who is providing this notice?** | This notice is provided by April Tax Solutions Inc. ("April") and is applicable to your April Filer account. |
| **What we do** | |
| **How does April protect my personal information?** | To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.<br>These measures also include organizational and administrative security measures. |
| **How does April collect my personal information?** | We collect your personal information, for example, when you<br>■ Open an account or seek financial or tax advice<br>■ Give us your income information or provide employment history or information<br>■ Give us your contact information<br>We also collect your personal information from other companies. |
| **Why can't I limit all sharing?** | Federal law gives you the right to limit only<br>■ sharing for affiliates' everyday business purposes—information about your creditworthiness<br>■ affiliates from using your information to market to you<br>■ sharing for nonaffiliates to market to you<br>State laws and individual companies may give you additional rights to limit sharing. |
| **Definitions** | |
| **Affiliates** | Companies related by common ownership or control. They can be financial and nonfinancial companies.<br>■ *April has no affiliates.* |
| **Nonaffiliates** | Companies not related by common ownership or control. They can be financial and nonfinancial companies.<br>■ *If you provide consent, April may disclose personal information to the partner financial institution of which you are a customer so that such partner can market to you.* |
| **Joint marketing** | A formal agreement between nonaffiliated financial companies that together market financial products or services to you.<br>■ *Our joint marketing partners include banking and other financial services companies.* |
| **Other important information** | |

**Vermont:** If you are consumer with a Vermont mailing address, we will not share information we collect about you with Nonaffiliates unless the law allows.

**California:** If you are a consumer with a California mailing address, we will not share information we collect about you with Nonaffiliates unless the law allows.