



## Privacy Policy Summary and Consent to Use and Disclosure of Information

Liberty Tax Service Inc. ("Liberty Tax") is dedicated to maintaining high standards of confidentiality with respect to the personal information that we collect from our customers. This is a summary of our privacy policy. The full privacy policy can be found at <https://www.libertytaxcanada.ca/privacy-policy>. This is also a consent to the use and disclosure of your personal information in connection with the tax return preparation process and in connection with the provision of any other services or products that you request.

**Your Personal Information.** We collect and use personal information that is required for the preparation and filing of your tax return; including your contact information such as address and email address, your identifying information such as SIN and your tax and financial information. We collect and use information necessary for payment and billing. If you request products or services in addition to tax return preparation, we collect and use your personal information to fulfill these requests. We may also collect and use your personal information to attempt to understand your preferences so that we can offer you products or services. To the extent possible, personal information will be collected directly from you. If you are unable to provide necessary personal information, we may attempt to obtain such information from a financial institution, government agency or other third party source. Collection of information is limited to that information required to perform the services that you request, comply with regulatory requirements, market products and services and manage business operations.

**Security.** Liberty Tax is dedicated to maintaining physical, procedural and technological security in an attempt to prevent any loss, misuse or unauthorized access of your personal information.

**Disclosure.** Liberty Tax limits disclosure of your personal information. We do not disclose personal information to third parties, except as necessary to perform the services that you request, to comply with regulatory requirements and to manage business functions. Notwithstanding the foregoing, Liberty Tax will disclose your personal information to a third party collection agency if you owe a debt to Liberty Tax as a result of an over-payment of tax refund monies paid to you arising from your participation in the "Tax Rush" services offered by Liberty Tax. Please note that Liberty Tax uses its affiliated companies, located in the United States, to assist in the delivery of services. Therefore, your personal information may be retained in the United States and subject to United States laws in addition to Canadian laws.

**Consent to Electronic Communications.** Would you allow us to communicate with you electronically? We would like to contact you electronically, including via email, regarding your tax return, tax filing information, tax updates, appointment setting, customer service matters, service and product opportunities and other promotional matters. You can ask us to stop electronic communications by contacting us at [CanadaInfo@libtax.com](mailto:CanadaInfo@libtax.com).

**By signing below, you consent to receiving the types of electronic communications listed above from Liberty Tax.**

**Also, by signing this below, you acknowledge that you have reviewed and agree with the terms of the Liberty Tax Privacy Policy and you consent to the collection, use and disclosure of your personal information for the purposes and in the manner described in this Privacy Policy Summary and in the Liberty Tax Privacy Policy.**

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

If you have a question about the Liberty Tax Privacy Policy, please call (800) 790-3863 or contact us at [CanadaInfo@libtax.com](mailto:CanadaInfo@libtax.com).