

Privacy Notice and Cookies Policy

Last updated: May 23, 2018

Wolters Kluwer Tax & Accounting North America, “we,” “us,” “our,” or “Wolters Kluwer TAA NA”) is committed to protecting the privacy of anyone who visits our websites or registers to use our services or to attend our events. This Privacy Notice and Cookies Policy (the “Notice”) is designed to tell you about our practices regarding collection, use, storage, and disclosure of information we collect via our websites or any of our mobile applications and the consent required for those activities. This Notice applies to any of our websites, applications, products, software, or services that display a link to this Notice (the “Websites”). Please be sure to carefully read this Notice in its entirety before using or submitting information to this site.

Your use of this website

Use of this Website constitutes your agreement to the terms of this Notice and the application of any applicable laws and regulations. Whenever you submit personal data and any other information via this Website, you acknowledge that data and information will be collected, used and disclosed in accordance with this Notice.

Our services are geared towards professionals and not aimed at children. In compliance with the United States Children's Online Privacy Protection Act (COPPA), we do not seek information from children 13 and under.

Information we collect

We will use and process your personal data lawfully, fairly and in a transparent manner. We will collect and use your personal data solely for the specified and legitimate purposes stated in this Notice. We use your personal data to:

- set up your account and verify your identity;
- provide the products or services and related activities you request;
- provide direct and digital marketing communications via email, direct mail and telephone communication or through personalized online experiences;
- provide you with best-practice and thought leadership content that is relevant to your job function and/or company;
- contact you, if you request that we contact you or to send you the requested information;
- provide better customer service when you contact us;
- improve the quality, content and overall user experience of the Websites;
- notify you of new features and updates to the Website or any of our products;
- administer surveys, contests and other promotional events; and

- address other business needs such as website administration, security and fraud prevention, legal compliance and business continuity.

Information you provide to us

The Websites actively collect information from its visitors both by asking you specific questions when you interact with us such as:

- i. registering on our Websites;
- ii. signing up to receive information from us;
- iii. making a purchase;
- iv. entering into promotions or contests;
- v. accessing certain parts of the Websites;
- vi. benefiting from specified Website features;

or otherwise by permitting you to communicate directly with us via e-mail.

You can choose not to enter any of your Personal Data into the Websites. However, if you choose not to provide us with your Personal Data in these circumstances, we may be unable to respond to your inquiry, engage in further communications with you and/or provide the requested services.

We will, depending on the nature of your communication with Wolters Kluwer TAA NA with respect to your visit to the Websites, use your Personal Data as follows:

- **If you are making an inquiry about how our services could help your business:** we will use your Personal Data to respond to any inquiry you may make and/or provide you with information that you request from us because it is in our legitimate interests to use your Personal Data to communicate with you, to respond to your request and develop the relationship between us;
- **If you view or download a content asset (e.g., white paper, case study, competitive analysis, etc.):** we will use your Personal Data to provide you with information and materials that could be relevant or related to the content asset that you viewed or downloaded because it is in our legitimate interests to use your Personal Data to communicate with you and develop the relationship between us;
- **If you are making an inquiry about how your business could support or work with our business:** we will use your Personal Data to consider how your business could support or work with our business because it is in our legitimate interests to use your Personal Data to consider whether it would be beneficial to work with your business;

- **If you are an existing client, supplier, or partner of ours and you are making an inquiry about your agreement or relationship with us:** we will use your Personal Data to respond to you as an existing client, supplier or partner of ours in relation to a pre-existing agreement or relationship because it is in our legitimate interests to use your Personal Data to manage your business' relationship with us. It may also be necessary for us to:
 - use your Personal Data to perform an agreement with your business, where we would be unable to provide those services to or receive them from your business without that information (for example, if a particular service or information is to be provided to you at your business, we would be unable to provide that service or information unless we were able to use your Personal Data for that reason);
 - use your Personal Data to comply with a legal obligation relating to how we manage our business or our relationship with your business;
- **If you are member of the public and you are making an inquiry about whether you could work for us:** we will use your Personal Data to consider and decide how to respond to your inquiry because it is in our legitimate interests to use your Personal Data to consider whether we have any suitable job vacancies and to contact you about them. It may also be necessary for us to use your Personal Data to comply with a legal obligation relating to how we manage our business;
- **If you are making any other type of inquiry, such as to "request a demo":** we will use your Personal Data to consider and respond to your inquiry because it is in our legitimate interests to use your Personal Data in order to determine how to answer your query and/or provide you with the relevant information and/or service. Depending on the subject of your inquiry, it may also be necessary for us to use your Personal Data to comply with a legal obligation relating to how we manage our business or our relationship with your business;
- **If we do not know you or your role at your business:** we may also use your Personal Data to confirm your identity and the business that you work for, as well as your role at that business. We do this because it is in our legitimate interests to make sure that your inquiry is genuine and is not being made for fraudulent reasons or is spam. We may also do this because we may be subject to legal obligations which require us to confirm the details that you provide to us before entering into a relationship with you; and
- **If you opt-in to receive marketing communications,** we will use your Personal Data to contact you to share information about the relevant products, services, news and events. When you enter your contact details for this reason and click "sign up", you will be consenting to us contacting you for these purposes. We will

only be able to send you marketing communications if you have provided your consent.

When you provide us with your information, you are giving your consent for your Personal Data to be used by us to contact you by email, direct mail and telephone, and to deliver personalized website experiences, to share information about relevant products, services, best practice information, industry news and events. You are entitled to withdraw your consent to us contacting you or to amend your communication preferences by contacting us at the email address listed under Contact Information below or by going to [Communication Preferences](#).

If you decide that you do not want to receive any correspondence from us about the services we could provide your business, including communications regarding product information, press releases, newsletters, marketing, promotions, and/or other topics please click the "unsubscribe" link provided in that promotional email message or go to [Communication Preferences](#). Withdrawing your consent will not affect our use of the Personal Data prior to you withdrawing that consent but it will mean that we will not be able to contact you about the services we may be able to offer you or your business in the future.

We will let you know where you must provide us with Personal Data in order to perform an agreement with you or your business or to comply with a legal obligation.

Information we collect from your browser and your device

As you navigate through the Websites, we will automatically collect information about your interaction with the Websites such as your IP address, traffic data, clickstream information, time stamp, location data, web logs, other communication data and the resources that you access when you visit the Websites and your browser or other applications on your device interact with it. We automatically collect this data using various technologies such as cookies, web logs and beacons and internet tags as described below. This information allows us to better tailor our content to users' needs and is only gathered while you are on the Website.

We automatically receive and record such information on our server logs from your browser. As discussed below, we use this information to diagnose problems with our server, report aggregate information for statistical analysis, determine the fastest route for your computer to connect to our Websites and administer and improve the Websites.

To the extent this information constitutes personal data, we use it to ensure that content from the Websites is presented in the most effective manner for you and your

device because it is in our legitimate interests to improve our customers' online experience in relation to the Websites.

Sharing of information with third parties

We do not sell, rent or lease your Personal Data to unaffiliated third parties without your consent. However, we may share your Personal Data with third parties in certain situations in order to confirm your identity, respond to your query and facilitate your use of the Websites. By visiting the Websites you agree to the following disclosures:

- a. we may check your Personal Data by searching for your name and that of your business in publically available and private databases of business and individuals, which will use the details entered by us to provide us with the search results. For example, we may use databases such as those retained by LinkedIn or data.com for this purpose;
- b. we may pass your information on to selected third parties including:
 - our service providers and sub-contractors for the performance of any contract we enter into with them or you;
 - our business partners, but only to the extent you have purchased or expressed an interest in a product or service of such business partner or interacted with or otherwise authorized the sharing of your Personal Data with such business partner;
 - advertisers and advertising networks that require the data to select and serve ads to you and others;
 - a purchaser or successor entity in the event of a sale or other corporate transaction involving some or all of our business or as needed to affect the sale or transfer of business assets, or as needed for external audit, compliance or corporate governance related matters;
 - analytics and search engine providers that assist us on the improvement and optimisation of the Websites; and
 - a third party to which we have a duty to disclose or share your information (i) to enforce or apply our terms of use and other agreements; (ii) as required by applicable law, court orders, government regulators or legal process (including subpoenas); (iii) as necessary to protect the property, safety and rights others. This includes exchanging information with other companies and organisations for the purpose of fraud protection and credit risk reduction.

We also share your Personal Data with our affiliates for the purposes set forth in this Notice.

Use of cookies

Our Websites use “cookies” to enhance your use of the Websites and/or services and to monitor your activity during your visit(s) to the Websites. Cookies are small text files that are stored on your browser and the hard drive of your computer, mobile or other handheld device. The cookies store information about your visit to the Websites and distinguish you from other users. Our use of cookies allows us to provide you with a good experience when you browse our Websites.

The use of cookies helps us to display content on the Websites and also allows us to obtain and analyze statistics about the use of the Websites so that we can improve it. By continuing to use the Websites you consent to our use of cookies as explained in this Notice

Below is a description of the types of cookies used on the Websites and provides detail about what they are used for. When you use the Websites for the first time, cookies which are essential to make the Websites operate (see those identified as “essential cookies” below) will have been set. If you do not want other cookies set, please adjust your browser settings as described below under “Disabling or deleting cookies.”

Some cookies are deleted when you close your browser. These are known as session cookies. Others remain on your device until they expire or you delete them. These are known as persistent cookies and enable us to remember things about you as a returning visitor.

If you do not want cookies to be stored, then you may turn off certain cookies described below individually or you can select the appropriate options on your web browser to delete some or all cookies. Please note, however, that if you block some or all cookies (including essential cookies) you may not be able to use or access all or parts of the Websites, such as being able to log on to member specific areas.

How we use Cookies on our Websites

Session Cookies

We use session cookies for the following purposes:

- To control access to paid for subscription content.
- To allow you to carry information across pages of our Website and avoid having to re-enter information.
- To allow you to access stored information for future use, such as registration.
- To compile anonymous, aggregated statistics that allow us to understand how users use our Website and to help us improve the structure of our Website.

Persistent Cookies

We use persistent cookies for the following purposes:

- To control access to paid for subscription content.
- To help us recognize you as a unique visitor (just a number) when you return to our Website and to allow us to tailor content to match your preferred interests.
- To compile anonymous, aggregated statistics that allow us to understand how users use our Website and to help us improve the structure of our Website.
- To internally identify you by account name, email address, customer ID, and location (geographic and computer ID/IP address).
- To tailor content to your preferences.

Third Party Cookies

Third parties serve cookies via our Websites. These are used for the following purposes:

- To serve content on Websites and track whether this content is clicked on by users.
- To control how often you are shown particular content.
- To count the number of anonymous users of our Websites.
- For Website usage analysis.
- To link the information we store in cookies to any personally identifiable information you submit while on our Websites.

Disabling or deleting cookies

You can set your browser so that installed cookies are deleted and you do not receive cookies during your next use of the website. Below are links to instruction on how to remove different types of cookies from different browsers:

- [Chrome](#)
- [Mozilla](#)
- [Explorer](#)
- [Safari](#)
- [Opera](#)

If you disable or delete cookies, it may be that you do not have access to (parts of) the website or that the website does not work optimally. To find out more about these functions, it is best to consult your browser instructions or the help function of your browser.

Please note that Google and other third parties (including, for example, advertising networks and providers of external services like web traffic analysis services) may also use cookies as a result of you visiting other websites, over which we have no control.

We do not currently commit to responding to web-browser do not track signals or other mechanisms that provide users the ability to exercise choice regarding the collection of Personal Data about a user's online activities over time and across third-party websites or online services ("DNT"). This is due in part, because no common industry standard for DNT has been adopted by industry groups, technology companies or regulators. We will continue to monitor developments around DNT browser technology and reassess our practices with respect to DNT as needed.

Security

We have implemented appropriate technical and organizational measures on our servers, which are designed to protect your Personal Data from accidental or unlawful destruction, loss, alteration, unauthorized disclosure of, or access to, Personal Data transmitted, stored or otherwise processed.

You should keep in mind that Internet transmissions (including emails) are never completely secure or error-free. As such, you should take steps to protect yourself, especially online and take special care in deciding what information you send to us via e-mail or other transmissions. Moreover, where you use passwords, ID numbers, or other special access features on the Websites, it is your responsibility to safeguard them. You should choose a strong password, do not use the same password that you use on other websites and do not share your password with anyone else. Also remember to sign out of our Websites and close your browser window when you have finished to ensure that others who may have access to your computer cannot access your Personal Data.

Links to other websites, social media and public forums

This site may contain links or references to other websites. Please be aware that we do not control other websites and, except as otherwise noted in the applicable website, this Notice does not apply to those websites. We encourage you to read the privacy and cookie policy of every website you visit. We are not responsible for the security or privacy of any information collected by these third parties.

We may offer certain "share" or "social media" functionality on some of our Websites. If you choose to use these functions, we may and/or the third party social media networks may collect certain information about you depending on the function or feature you use. With respect to the social media features (such as allowing you to post information about your activities or share your information with others on a social media site), the collection and use of information by and your interactions with the third party social media network will be governed by the privacy policy of the company

providing those social media features. We are not responsible for the security or privacy of any information collected by these third parties.

By providing us with Personal Data about other people, you warrant that they have provided you with their consent to receive the relevant “share” or “social media” communication.

Some of our Websites may provide forums and other areas where you can communicate with others and publicly post information. All the information (including any of your Personal Data) you post will not be private and will be accessible by anyone with Internet access, and may be read, collected, and used by others. You should use caution when posting any Personal Data to these public areas.

Marketing and customer relationship software applications

Your Personal Data may be held in our marketing automation software and customer relationship management software (Salesforce) for the purposes outlined above, and to properly track compliance, such as previous consent or opt-ins, as well as your company’s relationship history with us.

For more information on how these applications use your Personal Data, please follow the links listed below:

- [Marketo](#)
- [Eloqua](#)
- [Salesforce](#)
- [Pardot](#)
- [Salesforce Marketing Cloud \(ExactTarget\)](#)
- [Hubspot](#)
- [SendGrid](#)
- [Return Path](#)
- [Google Analytics](#)
- [Google Adwords](#)
- [Unbounce](#)
- [Adroll](#)
- [Magento](#)

European data protection legislation

For the purposes of this Notice, "European Data Protection Legislation" means all applicable legislation relating to data protection in the European Economic Area ("EEA"), including the EU General Data Protection Regulation 2016/679 ("GDPR") and all legislation implementing or made under or pursuant to or replacing or superseding the

GDPR. Where this Notice uses terms which are defined in the GDPR, the definitions set out in the GDPR will apply.

"Personal Data" is data relating to you from which you can be reasonably identified. Examples of Personal Data include your full name, email address, postal address, telephone number, job title or the company you work for. We recognize that your Personal Data is valuable and we process it in accordance applicable law, and, to the extent that it applies to your Personal Data, with European Data Protection Legislation.

Data Controller

Wolters Kluwer TAA NA is the data controller responsible for the processing of your Personal Data collected from the Websites under the European Data Protection Legislation (to the extent that it applies to Personal Data collected about you) and other applicable law.

Your Rights under the European Data Protection Legislation

With respect to the Personal Data that Wolters Kluwer TAA NA collects about you from the Websites, to the extent that you are located in the EEA, under European Data Protection Legislation you have the right to:

- a) request access to that Personal Data;
- b) receive a copy of the Personal Data that you have provided to Wolters Kluwer TAA NA in a structured commonly used format so that you can share it with others;
- c) where Personal Data is inaccurate or incomplete, ask for Personal Data to be rectified or completed;
- d) request the transfer of your Personal Data to another party;
- e) ask that Personal Data be erased;
- f) object to us processing your Personal Data by asking for the processing of that Personal Data to be restricted or stopped. For example, if Wolters Kluwer TAA NA uses your Personal Data for marketing purposes; and
- g) make a complaint to a European data protection authority about the manner in which Wolters Kluwer TAA NA processes your Personal Data.

Please contact the person listed under "Contact Information" below to exercise these rights or for additional information. When you contact us to exercise the above rights, we may ask for further information from you, to confirm your identity, as we take the protection of your Personal Data seriously. If you have an online account with us, you may be able to log into your account to access and update the information you have provided to us.

International data transfers

We store and process your personal data in the United States. We may transfer and access such information from around the world, including other countries in which we have operations or in which our hosted service providers' cloud servers are located. By providing us with your personal data, you consent to this transfer. Your data shall be protected in accordance with this Notice regardless of where it is processed or stored.

Changes to this Privacy Notice

We may from time to time amend this Notice to reflect any changes in WK' practices, services and legal obligations. If WK makes any material changes to the way WK collects, uses or shares your Personal Data, WK will notify you of those changes by posting an updated notice on the specific site to which it relates or by an electronic communication to you, which will indicate the effective date of the proposed changes. Your continued use of the Sites and the services following the effective date of a change to this Notice signifies your acceptance and agreement to the terms of the revised notice. WK encourages you to periodically visit this page to determine the current terms to which you are bound. This Notice has been revised at the "Last Updated" date displayed at the top of this Notice.

Contact information

If you have any questions, comments or concerns about this Notice or our privacy practices or wish to file a complaint, please contact us in one of the following ways:

Wolters Kluwer Tax and Accounting North America Data Protection Officer:

Email:

TAAPrivacySecurity@wolterskluwer.com

Address:

Attn: Wolters Kluwer Tax and Accounting North America Data Protection Officer
Wolters Kluwer
2700 Lake Cook Rd.
Riverwoods, IL 60015 USA