REVIEW DRAFT | NOT EXECUTED | VERSION 2026-09-26-D1

What The Prototype Records

Status And Contact

Review draft for Cima Tax Pro, LLC.; version 2026-09-26-D1. Contact Rasheeda@cimataxpro.com with privacy questions. Confirm the business mailing address, production processors, retention schedule and applicable state-law notices before adopting this notice for paid enrollment.

Inquiries And Applications

Forms collect contact details, optional business information, intended role, self-reported credential readiness and your message. These are used to respond, assess fit and coordinate the next step. Credential status is different from credential numbers. Do not put PTIN/EFIN documents, SSNs, tax returns, identity scans or bank information in general forms.

Accounts, Orders And Review

WooCommerce records the account and billing information you enter, the selected product, order amount/status and applicable order details. The enrollment desk records readiness, acknowledgment time, approval references, assigned access/support links and checklist progress. Authorized operators review these records. A demo order is marked as a demonstration and does not verify money received.

Learning And Technical Data

Open orientation progress is kept in the browser. Account-based classroom features may keep enrollment and progress records in the site database. Login, cart and security features use necessary cookies/session data. Hosting and security systems may record technical connection logs. The current custom theme does not itself add advertising pixels; installed services must be inventoried before optional tracking is introduced.

Purpose-Limited Access

Information should be accessed only as needed for requested services, account operation, support, fraud prevention, recordkeeping or legal obligations. Hosting, email and relevant service providers may process information for those purposes. Identify the necessary provider and authorized transfer before any software or bank enrollment; a generic form is not permission for unrelated marketing.

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Your Choices And Our Operating Boundaries

Sensitive Tax Information

Use only the secure document channel designated for your engagement. This website notice does not authorize disclosure or use of tax-return information for marketing or unrelated services. Any legally required taxpayer consent must be obtained separately in the required form; do not replace it with a website checkbox.

Tax Branding Pro

An interest request does not automatically transfer your application, tax information or customer list to Tax Branding Pro. A separate, specific request and any required permission must precede a referral. Follow the specialist's own terms and privacy notice when its service becomes available.

Messages And Choices

Service messages concern your request, account or order. Newsletter consent is separate and should remain optional; declining it must not block a purchase. Use the unsubscribe mechanism for optional marketing. Keep taxpayer documents and passwords out of replies to ordinary email.

Correction, Access And Deletion

Contact Rasheeda using the email associated with your record. Describe the request without attaching identity documents. Cima should verify requests proportionately and explain any legal or security restriction. Deletion may be limited by recordkeeping, disputes or legal holds; no instant or universal deletion promise is made. Browser-local progress can be reset on the learning page.

Retention And Security

Retain information only for its documented business purpose and applicable legal requirements. A production retention schedule, access review, incident process and Written Information Security Plan must be maintained separately. This notice is not that security plan and does not certify that every safeguard has been implemented. No system can promise absolute security.

External Services And Updates

External IRS, software, lender and learning-provider sites have separate practices. Review their notices before submitting information. Material changes to this notice should be dated and communicated as appropriate. A data-rights request or lawful complaint will not be restricted by this notice.