

## Lawful Basis of Processing

The table below describes the categories of personal data we collect from and about you.

| Category of personal data                | Description   |
|--|---|
| Account profile data                     | Such as name, previous name(s) and/or nicknames, title and honorifics, education, billing and mailing addresses, phone number and email address, profile photo, billing information (your payment information), purchase history, demographic information, preferences, subscription data, and your username and account credentials. |
| Communication interaction data           | Such as your interactions with our email, text or other communications (e.g., whether you open and/or forward emails) - we do this through use of pixel tags (which are also known as clear GIFs), which are embedded in our emails.  |
| Communications, feedback and survey data | Such as your name, email address, telephone number and any other personal data you choose to share. This information includes: call center recordings and call monitoring records, chat and text records, voicemails, photographs, and video images.  |
| Contact data                             | Name, postal address, email address, phone number, professional title and company name  |
| Data about others                        | You may be able to input or process personal data about others, for example, if you are an account administrator of one of our products or use Intuit to manage customer lists.   |
| Demographic and preferences data         | Such as information from information services and data licensors that provide demographic and preference information to us.   |

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| Device data                | Such as information about your device(s), IP addresses, log information, error messages, device type, and unique device identifiers. For example, we collect IP addresses from you as part of our sign in and security features.   |
| Identity Verification data | Such as name, date of birth, social security number, social insurance number, driver's license number, passport number, government-issued identification details, and similar information to verify your identity and to help you file your tax return.  |
| Location data              | Certain features in the Intuit Platform collect your precise location information, device motion information, or both, if you or your organization grant(s) us permission to do so through your device settings (for example, if you use QuickBooks' time-tracking service, participate in Karma Drive, or use CK Money to locate nearby ATMs).  |
| Marketing data             | Such as contact information and preferences for receiving marketing communications.  |
| Online behavioral data     | Such as metrics about your use and interactions with our websites, customers' websites or e-commerce stores, social media websites, and marketing campaigns that we or our customers organize, including device information (such as your IP address and unique device IDs), page view information and search results, links, and if you are a customer contact, whether or not a campaign presented or sent to you using our offerings has been viewed, delivered, opened, clicked on, whether it has bounced or was treated as spam. |
| Financial data             | Such as information about your business, your finances, expenses, invoices, financial statements, details of your financial transactions, payroll details, payment details, tax return details, details about your customers, vendors, or employees, income and wage information, and/or investment information.   |

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| Usage data | Such as the pages you viewed, the services and features you used or interacted with, your browser type, and details about any links or communications with which you interacted. |
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We use the personal data that we collect from and about you for the purposes described in this table or for purposes that we explain to you at the time we collect your information. Depending on our purpose for collecting your information, we rely on one of the following legal bases:

- a) in certain circumstances, we may ask for your consent (separately from any contract between us) before we collect, use, or disclose your personal data, in which case you can voluntarily choose to give or deny your consent without any negative consequences to you; **[CONSENT]**
- b) we require certain personal data in order to provide the products and support the services you purchase or request from us; **[PERFORMANCE OF A CONTRACT WITH YOU]**
- c) there are instances where we must process and retain your personal data to comply with laws or to fulfil certain legal obligations; **[LEGAL OBLIGATION]**
- d) we will use or disclose your personal data for the legitimate interests of either Intuit or a third party, but only when we are confident that your privacy rights will remain appropriately protected. Where we require your data to pursue our legitimate interests or the legitimate interests of a third party, it will be in a way which is reasonable for you to expect as part of the running of our business and which does not materially affect your rights and freedoms. **[LEGITIMATE INTEREST]**
- e) processing is necessary in order to protect your vital interests or those of another person; **[VITAL INTEREST]**

The following table provides more details on our purposes for processing your personal data and the related legal bases. The legal basis under which your personal data is processed will depend on the data concerned and the specific context in which we use it.

| Purpose | Category of Personal Data | Legal Basis |
|---------|---------------------------|-------------|
|---------|---------------------------|-------------|

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|---|---|--|
| <p>Register your account on the Intuit Platform, to manage and administer your account and identity.</p>  | <p>Contact data, Device data, Financial Data, Identity Verification data, Account profile data, Demographic and preferences data.</p>   | <p><b>Performance of a contract with you.</b></p>  |
| <p>Provide and deliver Intuit products and services, including delivery of products, electronic receipts and returns information.</p>   | <p>Contact data, Location data, Device data, Financial data, Account profile data, Identity Verification data, Data about others, Communications, feedback and survey data.</p>                                   | <p><b>Performance of a contract with you</b>, for all categories except Location data.<br/><br/>For Location data, <b>Consent</b>.</p>   |
| <p>Process transactions, payroll, and refunds.</p>  | <p>Contact data, Device data, Financial data, Identity Verification data.</p>   | <p><b>Performance of a contract with you.</b></p>  |
| <p>Respond to your communications regarding our products and services, send you service updates, confirmations, invoices, technical notices, updates, security alerts, support and administrator messages, respond to your inquiries, requests or complaints.</p>           | <p>Contact data, Communications, feedback and survey data, Online behavioral data and Usage data.</p>   | <p><b>Performance of a contract with you.</b></p>  |
| <p>Keep our customers, vendors, and visitors secure and address threats to their safety or the safety of others; to detect and prevent fraud.</p>   | <p>Contact data, Location data, Device data, Data about others, Identity Verification data, Account profile data, Online behavioral data, Usage data, Financial data, Data derived from the above categories.</p> | <p><b>Legal obligation</b><br/>Otherwise, <b>Legitimate Interests:</b><br/>Necessary for our and our third parties' legitimate interests (to operate and provide our business; to detect or prevent illegal activities (e.g. fraud) and/or to manage the security of our IT infrastructure, and the safety and security of our employees, customers, vendors, and visitors).</p> |
| <p>Manage our use of tracking technologies such as cookies (including enabling you to manage your cookie preferences) and analyze collected data to learn about our Websites and Apps, to improve our Websites and Apps, and to develop new products and services. This</p> | <p>Online behavioral data, Usage data and Device data.</p>  | <p><b>Consent:</b> For non-essential cookies (see the Manage Cookies link or Cookie Preferences link located at the bottom of our website).<br/><br/>Otherwise <b>Performance of contract with you:</b> For strictly necessary cookies.</p>  |

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| <p>includes website analytics, identifying browsing / purchasing trends and patterns and evaluating this information.</p>  |   |  |
| <p>Analyze data including metrics related to consumer transactions and behavior, to assess trends and the effectiveness of our advertising and marketing campaigns, to help us understand your needs and provide you with better service and offers, to drive customer engagement, promote our brand, and inform other business decisions by understanding consumer behaviour.</p> | <p>Online behavioral data, Usage data, Financial data, Device data, Contact data, User-generated content, Marketing data, Communications, feedback and survey data, Communication interaction data, Data about others, Account profile data.</p>  | <p><b>Consent:</b> Where required under applicable law.</p> <p>Otherwise our <b>Legitimate interests:</b> To operate, provide and improve our business or use the insights to improve or develop marketing activities and promote our products and services.</p> |
| <p>Contact current and prospective customers about Intuit's products and services, promotions and events we think may be of interest.</p>  | <p>Contact data, Marketing data, Online behavioral data, Usage data, Communication interaction data.</p>  | <p><b>Consent:</b> Where required under applicable law.</p> <p>Otherwise <b>Legitimate interest</b> to communicate with you and to develop marketing activities and promote our products and services.</p>   |
| <p>Comply with legal and regulatory obligations to which we are subject, including our obligations to respond to your requests under data protection law.</p>  | <p>Contact data, Device data, Financial data, Identity Verification data, Account profile data, Demographic and preferences data, Online behavioral data, Usage data, Communication interaction data, Data derived from the above categories.</p> | <p><b>Legal obligation.</b></p>  |
| <p>Protect our legal rights (including where necessary, to share information with law enforcement and others), for example to defend claims against us and to conduct litigation to defend our interests.</p>  | <p>Contact data, Location data, Device data, Data about others, Audio visual or similar sensory data, Account profile data, Online behavioral data, Usage data, Financial data, Data derived from the above categories.</p>                       | <p><b>Legitimate interests:</b> To protect our interests.</p> <p>Otherwise, in the UK, recognised <b>Legitimate interests:</b> To respond to requests for information from a public body.</p>  |

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