

This Notice supplements information contained in Avalara’s [US Privacy Notice](#) and applies solely to residents of the State of California with respect to the personal information that Avalara, Inc. and its corporate business affiliates (“Avalara”) process. Any terms defined under the California Consumer Privacy Act of 2018, as amended by the California Privacy Rights Act of 2020 and its implementing regulations (“CCPA”), carry the same meaning when used in this Notice.

## Personal Information Collected in the Last 12 Months

Avalara collects personal information relating to marketing programs, advertising activities, sales operations, lead enrichment, analytics, and events or webinars (“Website Activities”) from the following categories of sources:

- Directly from you, including when you submit forms, register for events or webinars, communicate with Avalara, or otherwise interact with our websites or marketing materials.
- Automatically, through your interaction with our websites, emails, advertisements, and digital content, including through cookies, pixels, tags, and similar technologies.
- From other Avalara entities.
- From third parties, service providers, and contractors, including advertising networks, analytics providers, social media platforms, lead enrichment providers, event partners, data providers, and other business partners.

The table below presents the categories of personal information Avalara has collected, shared for cross-context behavioral advertising, and disclosed to service providers or contractors for business purposes in the preceding twelve months. Note that disclosures to service providers or contractors are made for business purposes only and are subject to contractual restrictions.

Category of personal information and examples provided by the CCPA	Shared for cross-context behavioral advertising	Disclosed to service providers or contractors
Identifiers, such as real name, alias, postal address, unique personal identifier, online identifier, IP address, email address, account name, social security number, driver’s license number, passport number, or other similar identifiers.	Yes	Yes
Any personal information described under the California Customer Records Act (Cal. Civ. Code § 1798.80(e)), such as business contact and professional information, including name, signature, physical characteristics or description, address, telephone number, employment, or employment history.  “Personal information” does not include publicly available information that is lawfully made available to the general public from federal, state, or local government records.	Yes	Yes
Commercial information, such as records of products or services purchased, obtained, or considered, or other purchasing or	Yes	Yes

consuming histories or tendencies.		
Internet or other electronic network activity information, such as browsing history, search history, and information regarding your interaction with an internet website application, or advertisement.	Yes	Yes
Geolocation data.	Yes	Yes
Audio, electronic, visual, or similar information, such as recordings or transcripts of communications, including chatbot and live chat interactions, emails, calls, and event participation.	No	Yes
Professional or employment-related information.	Yes	Yes
Inferences drawn from any of the information identified above to create a profile about you reflecting your preferences, characteristics, psychological trends, predispositions, behavior, attitudes, intelligence, abilities, and aptitudes.	Yes	Yes
Sensitive personal information, such as precise geolocation in connection with in-person events, tracking attendance for continuing professional education (CPE) reporting, and related compliance and security purposes.	No	Yes

Certain categories of personal information are shared only in specific contexts, such as lead generation, paid syndication, advertising measurement, or audience development. Avalara does not share all personal information within each category for cross-context behavioral advertising, and some information within a category may be used solely for internal purposes or disclosed only to service providers for business purposes.

## Use of Personal Information in the Last 12 Months

Avalara uses personal information collected through Website Activities for the following purposes:

- **Marketing, advertising, and sales operations**, including, for example, campaign delivery and measurement, segmentation, retargeting, personalization, lead capture, validation, enrichment, routing, qualification, and outreach. This may include collecting and analyzing information you provide through chatbots or live chat features to respond to inquiries, route requests, support sales and marketing activities, and improve our services.
- **Events, analytics, and performance measurement**, including, for example, event and webinar registration and management, communications, follow-up, attribution, reporting, optimization, and forecasting.

- **Business operations, security and system integrity**, including, for example, data normalization, monitoring, access control, and fraud prevention.
- **Legal and compliance purposes**, including, for example, recordkeeping, audits, and responding to lawful requests.

## Retention of Personal Information

Avalara retains personal information collected through Website Activities for periods that are reasonably necessary and proportionate to fulfill the purposes described in this Notice and in accordance with applicable law. Retention periods vary depending on the type of personal information; the context of your interactions with Avalara; whether the information is necessary to support ongoing business relationships, communications, or events; and applicable legal or business requirements.

Personal information is retained in accordance with Avalara's data governance and retention practices and is reviewed periodically to ensure it remains necessary for the purposes described in this Notice. In limited circumstances, personal information may be retained for longer periods where required to satisfy legal, regulatory, audit, or compliance obligations, resolve disputes, or enforce agreements. When personal information is no longer reasonably necessary for these purposes, Avalara takes steps to delete or de-identify it in accordance with our retention policies.

## Sharing / Selling of Personal Information in the Last 12 Months

Avalara shares personal information for purposes of cross-context behavioral advertising, as defined under the CCPA. This includes sharing personal information with advertising partners, analytics providers, social media platforms, and marketing or lead generation partners to deliver, measure, and optimize marketing campaigns.

The business and commercial purposes for this sharing include marketing and promoting Avalara's products and services, delivering and measuring advertising and marketing campaigns, developing and refining audiences, and supporting sales and business development activities.

Avalara does not sell personal information for monetary consideration.

California residents have the right to opt out of the sale or sharing of personal information by emailing [dataprivacy@avalara.com](mailto:dataprivacy@avalara.com) or calling our toll-free number at (877) 814-9390. Additionally, Avalara honors opt-out preference signals, including the Global Privacy Control ("GPC").

## Disclosure of Personal Information in the Last 12 Months

In the preceding 12 months, Avalara has disclosed the following categories of personal information, as defined by the CCPA, to service providers or contractors for one or more business purposes: identifiers; personal information described in the California Customer Records Act (Cal. Civ. Code § 1798.80(e)); commercial information; internet or other electronic network activity information; geolocation data; audio, electronic, visual, or similar information; professional or employment-related information; inferences; and sensitive personal information.

Such disclosures are made to entities that perform services on Avalara's behalf and at its direction. These entities are contractually required to use personal information only for specified business purposes, to protect it appropriately, and to comply with applicable privacy laws.

Disclosure may have occurred for the following business purposes:

- **Marketing, advertising, and sales enablement:** We disclose personal information to service providers and contractors that support Avalara's marketing, advertising, and sales operations, including platforms and services used to manage campaigns, generate and validate leads, facilitate communications, and support business development activities.
- **Analytics, measurement, and operational insight:** We disclose personal information to service providers and contractors that assist with analytics, reporting, and performance measurement to understand engagement, demand, and the effectiveness of Avalara's business activities.
- **Security, integrity, and reliability:** We disclose personal information to service providers and contractors that help maintain the security, integrity, and reliability of Avalara's systems, websites, and data.
- **Legal, compliance, and business administration:** We disclose personal information to service providers and contractors that support legal and regulatory compliance, recordkeeping, audits, and other necessary business administration functions. This may include disclosures to Avalara's private equity sponsor, Vista Equity Partners (US) and its affiliates, including Vista Consulting Group (collectively, "Vista"), in connection with governance, oversight, compliance, and permitted advisory activities.

## Statement Regarding Avalara's Use or Disclosure of Sensitive Personal Information

Avalara collects and uses limited categories of sensitive personal information, such as precise geolocation in connection with in-person events, only for purposes permitted under Section 7027(m) of the CCPA, including providing requested services, event administration, compliance, and security.

Accordingly, Avalara does not offer a right to limit the use or disclosure of sensitive personal information under the CCPA in this context.

## Statement Regarding the Use of Automated Decision-Making Technology ("ADMT")

Avalara uses automated processes to collect, route, enrich, and score leads and engagement data. However, Avalara does not use ADMT, as defined under the CCPA, to make decisions that produce legal or similarly significant effects concerning you without meaningful human involvement. Accordingly, Avalara does not offer rights to access information about or to opt out of ADMT under the CCPA for Website Activities.

## Statement Regarding Selling or Sharing the Personal Information of Individuals Under the Age of 16

Our services are not directed to, and we do not intend to, or knowingly, collect or solicit personal information from individuals under the age of 18. As such, Avalara does not have actual knowledge of selling or sharing the personal information of individuals under the age of 16 in connection with Website Activities.

## Your Rights Under the CCPA

As a resident of California, you have certain rights with respect to your personal information. This section describes those rights and how you can exercise them.

- **Right to Know.** You have the right to request that Avalara disclose to you (1) the categories of personal information that Avalara has collected about you and (2) the specific pieces of personal information Avalara has collected about you. This includes the categories of sources from which the personal information is collected, the business or commercial purpose for collecting, selling, or sharing personal information, and the categories of third parties to whom Avalara discloses personal information.
- **Right to Delete.** You have the right to delete personal information that Avalara has collected from you, subject to certain exceptions. We honor requests to delete unless an exception applies, such as when the information is necessary to complete the transaction or contract for which it was collected or when information is being used to detect, prevent, or investigate security incidents, comply with laws, or ensure another individual's ability to exercise their rights provided by law.
- **Right to Correct.** You have the right to correct inaccurate personal information that Avalara maintains about you.
- **Right to Opt Out of Sale or Sharing.** You have the right to opt out of the sale or sharing of your personal information, as those terms are defined under the CCPA.
- **Right Not to Be Retaliated Against.** You have the right not to be retaliated against for exercising privacy rights conferred by the CCPA.

To submit a request to exercise a right, please email [dataprivacy@avalara.com](mailto:dataprivacy@avalara.com) or call our toll-free number at (877) 814-9390.

When you submit a request to exercise your rights under the CCPA, Avalara will take steps to verify that you are the person making the request before we take action. We may ask you to provide information that reasonably enables us to match your request to personal information we already maintain about you in our systems. This may include information you have previously provided to us (such as your name or email address) and, where necessary, additional documentation or details to confirm your identity.

We will not require you to create an account in order to submit a request. Any personal information provided for verification purposes will be used solely to verify your identity and process your request, and not for any other purpose. Verification is not required for requests to opt out of the sale or sharing of personal information.

## Authorized Agent

You may designate an authorized agent to submit a request under the CCPA on your behalf if:

- the agent has written permission signed by you confirming that they are authorized to act for you; and
- you directly confirm with Avalara that you provided the authorized agent with permission to submit the request.

We may also require that you provide any information that Avalara requests to verify your identity. The information that Avalara asks you to provide to verify your identity will depend on your prior interactions with us and the sensitivity of the personal information at issue.

## Contact Us

If you have any questions or concerns about this Notice, please contact us at:

Email address: [dataprivacy@avalara.com](mailto:dataprivacy@avalara.com).

Postal address: Avalara, Inc., Attention: Chief Legal Officer, 512 S. Mangum Street, Suite #100, Durham, NC 27701.