

US Privacy Notice

Avalara, Inc., is committed to protecting the privacy of individuals whose personal data we collect (“you” or “your”). Avalara may collect personal data from individuals who register to use Avalara’s services, applications, and programs (“Services”), visitors to our website, individuals who request information, prospective customers, and event attendees. This Privacy Notice describes how Avalara and its subsidiaries and affiliated companies (“Avalara” or “we”) collect, use, and disclose personal data, and the choices Avalara offers regarding its collection and use of personal data.

We may also choose or be required by law to provide different or additional disclosures relating to the processing of personal data about residents of certain countries, regions, or states. Please refer to the **Region-Specific Disclosures** section below for additional disclosures that may be applicable to you.

This Privacy Notice does not address our privacy practices relating to Avalara job applicants, employees and other employment-related individuals, nor data that is not subject to applicable data protection laws (such as deidentified or publicly available information). This Privacy Notice is also not a contract and does not create any legal rights or obligations not otherwise provided by law.

Our Role in Processing Personal Data

Data protection laws sometimes differentiate between “controllers” and “processors” of personal data. A “controller” determines the purposes and means (the why and how) of processing personal data. A “processor,” which is sometimes referred to as a “service provider,” processes personal data on behalf of a controller subject to the controller’s instructions.

This Privacy Notice describes our privacy practices where we are acting as the controller of personal data. However, this Privacy Notice does not cover or address how our customers may process personal data when they use the Services, or how we may process personal data on their behalf in accordance with their instructions where we are acting as their processor. As a result, we recommend referring to the privacy notice of the customer with which you have a relationship for information on how they engage processors, like us, to process personal data on their behalf. In addition, we are generally not permitted to respond to individual requests relating to personal data we process on behalf of our customers, so we recommend directing any requests to the relevant customer.

If you access our services or otherwise interact with us from the European Economic Area, United Kingdom, or Switzerland, please see the **Data Controller** section of this Privacy Notice for more information about our legal entities operating as the controllers of your personal data.

Personal Data Collected

Avalara may collect personal data from you in different ways depending on how you interact with us and the Services. We also may collect personal data automatically when you interact with our websites or Services and may also collect personal data from other sources and third parties.

Data collected from you:

Avalara collects personal data directly from you, for instance when you inquire about one of Avalara's Services or send an email to Avalara, or from your interactions with our website, products or Services. Details include:

- **Contact details.** When you inquire about our [Services](#), register for an [event](#) or [seminar](#), download content like [white papers](#), communicate with us by email, or enter a live chat, we may collect your contact details, such as your name, company, address, phone number, fax number, and email address.
- **Account creation.** When you create an account with us via our website, we may collect your contact details and a password.
- **Billing and invoice data.** When you purchase Services or register to attend an event, we may collect billing and payment information, including payment card information, billing address, and other financial information (such as routing and account number). We may also collect information about your invoices such as postal addresses, invoice numbers, exemption certificate numbers, item descriptions, quantities, and amounts. Please note that we use third-party payment provider CyberSource and Fiserv, to process payments made to us ("Third Party Processors"). We do not retain do not retain any personally identifiable financial information, such as payment card number, you provide these third-party payment providers in connection with payments. Rather, all such information is provided directly by you to our third-party payment providers. The payment provider's use of your personal data is governed by their privacy notice.
- **Third Party Processors' privacy policies can be found here:**
[Privacy-notice | Fiserv.](#)
[Visa Global Privacy Notice | Visa.](#)
- **Feedback and support data.** When you communicate with us, we may collect the contents of custom messages sent through the forms, chat platforms, including our online live chat or automated chat functions, email addresses, or other contact information we make available to customers, as well as recordings of calls with us, where permitted by law (including through the use of automated tools provided by us or our third-party providers).

Personal data we automatically collect:

We, and our third-party partners, automatically collect information you provide to us and information about how you access and use our products and services when you engage with us. We typically collect this

information through the use of a variety of our own and our third-party partners' automatic data collection technologies, including (i) cookies or small data files that are stored on an individual's computer and (ii) other, related technologies, such as web beacons, pixels, embedded scripts, mobile SDKs, location-identifying technologies and logging technologies. Information we collect automatically about you may be combined with other personal information we collect directly from you or receive from other sources.

We, and our third-party partners, use automatic data collection technologies to automatically collect the following data when you use our services or otherwise engage with us:

- **Device and usage data.** When you use our website or our Services, we may automatically collect data about your device and about your usage of and activity on our website and Services. For example, we collect your device's operating system type, IP address, device identifiers (such as a persistent device identifier or advertising ID, browser type, device type, domain name, access times, and the duration of visit, and other information. We employ third-party technologies designed to allow us to recognize when two or more devices are likely being used by the same individual and may leverage these technologies (where permitted) to link information collected from different devices.
- **Interaction data.** When you use our website or Services, we may collect information about your interactions, including the site from which you came, the site to which you are going when you leave our Services, how frequently you access our Services, whether you open emails or click the links contained in emails, whether you access our Services from multiple devices, and other browsing behavior and actions you take on our Services (such as the pages you visit, the content you view, videos you watch, the communications you have through our services, and the content, links and ads you interact with). We employ third-party technologies designed to allow us to collect detailed information about browsing behavior and actions that you take on our services, which may record your mouse movements, scrolling, clicks, and keystroke activity on our services and other browsing, search or purchasing behavior. These third-party technologies may also record information you enter when you interact with our products or services, or engage in chat features or other communication platforms we provide
- **Location data.** When you use our website or mobile Services, we and our third-party providers may collect your contact details, the geographic location of the device, the geographic locations you provide to our Services, and geographic areas derived from your IP address.

All of the information collected automatically through these tools allows us to improve your customer experience. For example, we may use this information to enhance and personalize your user experience, to monitor and improve our products and services, to offer communications features such as live and automated chat, and to improve the effectiveness of our products, services, offers, advertising, communications and customer service. We may also use this information to: (a) remember information so that you will not have to re-enter it during your visit or the next time you visit the site; (b) provide custom, personalized content and information, including targeted content and advertising; (c) identify you across

multiple devices; (d) provide and monitor the effectiveness of our services; (e) monitor aggregate metrics such as total number of visitors, traffic, usage, and demographic patterns on our website; (f) diagnose or fix technology problems; and (g) otherwise to plan for and enhance our products and services.

For information about the choices you may have in relation to our use of automatic data collection technologies, please refer to the **How to Manage Your Personal Data** section below. For more information about the Cookies and Other Technologies we use, the data we collect and your choices, please click [here](#).

Personal data collected from other sources:

Avalara may also collect personal data from other sources, including third parties from whom we have purchased data, and we may combine this data with data we already have about you. We may collect personal data from:

- **Affiliates.** We are able to offer you the products and services we make available because of the hard work of our team members across all Avalara entities. To provide our products and facilitate our services, Avalara entities receive personal data from other Avalara entities for purposes and uses that are consistent with this Privacy Notice.
- **Partners.** Avalara may engage in joint marketing activities or event sponsorships with our third-party partners and we may collect personal data about you from these activities. We also allow partners to provide referrals to Avalara of individuals who may be interested in learning more about Avalara's Services. We rely on our partners to obtain your permission before sharing your personal data with us.
- **Social Media.** When you interact with our services through other social media networks, such as when you follow us or share our content on other social networks, we may receive some information that you permit the social network to share with third parties. The data we receive is dependent upon your privacy settings with the social network, and may include profile information, profile picture, username, and any other information you permit the social network to share with third parties. You should always review and, if necessary, adjust your privacy settings on third-party websites and social media networks and services before sharing information and/or linking or connecting them to other services. We use this information primarily to operate, maintain, and provide to you the features and functionality of our products and services, as well as to communicate directly with you, such as to send you messages about features that may be of interest to you.
- **Service Providers.** Avalara may also engage with third party service providers who help us understand how our customers are using Avalara's Services.
- **Other Sources.** We may also collect personal data about you from other sources, including publicly available sources, third-party data providers, brand partnerships, or through transactions such as mergers and acquisitions.
- **Inferences.** We may generate inferences or predictions about you and your interests and preferences based on the other personal data we collect and the interactions we have with you.

How We Use Your Personal Data

Avalara may use the personal data described above for the following purposes:

- To operate our Services, provide you with the Service that you or your company has requested, and to continually improve our Service offerings, internal systems, website, and processes.
- To manage our organization and its day-to-day operations.
- To create and maintain accounts for users and to authenticate your ability to access and use the Services.
- To detect and prevent fraud, protect the security of our website and Services, and enhance the safety of our Services.
- To troubleshoot or provide customer support.
- To communicate with you, including via email, chat, and social media.
- To facilitate the relationship we have with you and, where applicable, the company you represent.
- To plan and host corporate events, including online webinars.
- To provide you with the material you requested, to follow up with you about your interest in the Services, or to register you for the event you request.
- To infer additional information about you from your use of our products and services to understand you and your preferences so that we may enhance your experience and send you information about Avalara, our affiliates, and our partners, such as information about promotions or events.
- To create aggregated or de-identified information that cannot reasonably be used to identify you, which information we may use for purposes outside the scope of this Privacy Notice.
- To market our products and services to you, including through email and social media.
- To help maintain and enhance the safety, security, and integrity of our property, products, services, technology, assets, and business.
- To defend, protect, or enforce our rights or applicable contracts and agreements (including our Terms of Use), as well as to resolve disputes, to carry out our obligations and enforce our rights, and to protect our business interests and the interests and rights of third parties.
- To detect, prevent, investigate, or provide notice of security incidents or other malicious, deceptive, fraudulent, or illegal activity and protect the rights and property of Avalara and others.
- To facilitate business transactions and reorganizations impacting the structure of our business.
- To comply with contractual and legal obligations and requirements.

- To fulfill any other purpose for which you provide your personal data, or for which you have otherwise consented.

Avalara may also receive personal data from other sources, including third parties from whom we have purchased data, and combine this with the data we already have about you. This helps us to update, expand and analyze our records, identify new customers, and create more tailored advertising to provide products and services that may be of interest to you.

Our Disclosure of Personal Data

We may disclose or otherwise make available personal data in the following ways:

- **Service Providers.** Avalara may share your data with our contracted service providers and vendors so that these service providers and vendors can perform services on our behalf. For example, we use a third-party customer relationship management platform or data analytics platform to organize data and better understand our customers and prospective customers. These service providers are authorized to use your data only as necessary to provide the requested services to us.
- **Ad Networks and Advertising Partners:** We work with third-party ad networks and advertising partners to deliver advertising and personalized content on our services, on other websites and services, and across other devices. These parties may collect information automatically from your browser or device when you visit our websites and other services through the use of cookies and related technologies. This information is used to provide and inform targeted advertising, as well as to provide advertising-related services such as reporting, attribution, analytics, and market research.
- **Affiliates and Subsidiaries.** We may share your data with our subsidiaries and affiliates (those entities under common control) to provide the Services you request, such as customer support, marketing, technical operations, and account management purposes.
- **Avalara Partners.** Avalara's extensive partner network provides a broad range of integrations that enable our Services to interconnect with third party software. We may share your data with these partners to support our mutual customers. We may also share your data with our partners who co-sponsor events that you choose to attend.
- **Vista.** Avalara may share personal data with its private equity sponsor, Vista, and its affiliates, including Vista Consulting Group (US), for administration, research, database development, workforce analytics, and business operation purposes.
- **Payment Processor.** Avalara uses a third-party service provider to manage credit card processing. This service provider is not permitted to store, retain, or use billing information except for the sole purpose of credit card processing on our behalf.
- **In Connection with a Business Transaction or Reorganization.** We may take part in or be involved with a business transaction or reorganization, such as a merger, acquisition, joint venture, or financing

or sale of company assets. We may disclose, transfer, or assign personal data to a third party during negotiation of, in connection with, or as an asset in such a business transaction or reorganization. Also, in the unlikely event of our bankruptcy, receivership, or insolvency, your personal data may be disclosed, transferred, or assigned to third parties in connection with the proceedings or disposition of our assets.

- **To Facilitate Legal Obligations and Rights.** Avalara reserves the right to share your data if required by law or to comply with a judicial proceeding, court order, or valid legal process. We may also disclose your data to protect the rights and property of Avalara, our agents, employees, partners and customers, including to prevent or stop an attack on our systems or network or to prevent spam or attempts to defraud our users. Finally, we may also need to disclose your data in connection with or during the negotiation of any merger, financing, acquisition, bankruptcy, dissolution, transaction or proceeding involving the sale, transfer, divestiture or disclosure of all or a portion of our business or assets to another company.
- **With Your Consent and Direction.** We may disclose your personal data to certain other third parties or publicly with your consent or direction. For example, with your permission, we may post your testimonial on our websites.

How to Manage Your Personal Data

Communication Preferences

If you have received promotional communications from Avalara via email and would like to opt-out of future communications, you can click on the “unsubscribe” link located on the bottom of the emails message. If you unsubscribe from receiving promotional communications, you may still receive transactional messages regarding Service notifications, updates to our terms or Privacy Notice, or our ongoing relationship. To opt out of other forms of communication, you may unsubscribe by contacting us using the information in the “Contacting Us” section below.

Managing personal data

Avalara provides different accounts with varying functionality depending on the Services users access. Avalara accounts generally permit you to update your user settings or profile by logging into the applicable website or Service with your username and password. If you do not have an account but wish to make a request to manage your data, you can contact Avalara using the information in the “Contact Us” section below.

Requests to manage your data will be addressed within a reasonable timeframe. If you are an employee of an Avalara customer, you may also wish to contact your company’s system administrator for assistance in managing your data.

Automatic Data Collection Preferences

Certain of our services may provide you the ability to adjust your preferences regarding our use of automatic data collection technologies. For example, there is a “Cookie Preferences” manager linked in the footer of our websites that allows you to adjust your preferences regarding certain automatic data collection technologies on the specific website you are visiting for the specific device and browser you are using at that time (which means you will need to change your preferences on each device and browser you use to interact with the specific website you are visiting).

Where a Avalara-specific preference manager or privacy setting is not available, you may be able to utilize third-party tools and features to further restrict our use of automatic data collection technologies. For example, (i) most browsers allow you to change browser settings to limit automatic data collection technologies on websites, (ii) most email providers allow you to prevent the automatic downloading of images in emails that may contain automatic data collection technologies, and (iii) many devices allow you to change your device settings to limit automatic data collection technologies for device applications. Please note that blocking automatic data collection technologies through third-party tools and features may negatively impact your experience using our services, as some features and offerings may not work properly or at all. Depending on the third-party tool or feature you use, you may not be able to block all automatic data collection technologies or you may need to update your preferences on multiple devices or browsers. We do not have any control over these third-party tools and features and are not responsible if they do not function as intended.

Targeted Advertising Preferences

We engage third parties to help us facilitate targeted advertising designed to show you personalized ads based on predictions of your preferences and interests developed using personal data we maintain and personal data our third-party partners obtain from your activity over time and across nonaffiliated websites and other services. The data we and our third-party partners use for purposes of facilitating targeted advertising, as well as to provide advertising-related services such as reporting, attribution, analytics, and market research, are primarily collected through the use of a variety of automatic data collection technologies, including cookies, web beacons, pixels, embedded scripts, mobile SDKs, location-identifying technologies and logging technologies. We may share a common account identifier (such as a hashed email address or user ID) with our third-party advertising partners to help link the personal data we and our third-party partners collect to the same person, or otherwise target advertising to an individual on a third-party website or platform.

In addition to taking the steps set forth in the **Automatic Data Collection Preferences** section above, you may be able to further exercise control over the advertisements that you see by leveraging one or more targeted advertising opt-out programs. For example:

- **Device-Specific Opt-Out Programs:** Certain devices provide individuals the option to turn off targeted advertising for the entire device (such as Apple devices through their App Tracking Transparency framework or Android devices through their opt out of ads personalization feature).

Please refer to your device manufacturer's user guides for additional information about implementing any available device-specific targeted advertising opt-outs.

- **Digital Advertising Alliance:** The Digital Advertising Alliance allows individuals to opt out of receiving online interest-based targeted advertisements from companies that participate in their program. Please follow the instructions at <https://optout.aboutads.info/> for browser-based advertising and <https://www.youradchoices.com/appchoices> for app-based advertising to opt out of targeted advertising carried out by our third-party partners and other third parties that participate in the Digital Advertising Alliance's self-regulatory program.
- **European Interactive Digital Advertising Alliance:** The European Interactive Digital Advertising Alliance similarly allows individuals to opt out of receiving online interest-based targeted advertisements from companies that participate in their program. Please follow the instructions at <https://www.youronlinechoices.eu> to opt out of browser-based targeted advertising carried out by our third-party partners and other third parties that participate in the European Interactive Digital Advertising Alliance's program.
- **Network Advertising Initiative:** The Network Advertising Initiative similarly allows individuals to opt out of receiving online interest-based targeted advertisements from companies that participate in their program. Please follow the instructions at <https://thenai.org/how-to-opt-out/> to opt out of browser-based targeted advertising carried out by our third-party partners and other third parties that participate in the Network Advertising Initiative's self-regulatory program.
- **Platform-Specific Opt-Out Programs:** Certain third-party platforms provide individuals the option to turn off targeted advertising for the entire platform (such as certain social media platforms). Please refer to your platform provider's user guides for additional information about implementing any available platform-specific targeted advertising opt-outs.

Please note that when you opt out of receiving interest-based advertisements through one of these programs, this does not mean you will no longer see advertisements from us or on our services. Instead, it means that the online ads you do see from relevant program participants should not be based on your interests. We are not responsible for the effectiveness of, or compliance with, any third parties' opt-out options or programs or the accuracy of their statements regarding their programs. In addition, program participants may still use automatic data collection technologies to collect information about your use of our services, including for analytics and fraud prevention as well as any other purpose permitted under the applicable advertising industry program.

Partner-Specific Preferences

Certain of our third-party providers and partners offer additional ways that you may exercise control over your personal data, or automatically impose limitations on the way we can use personal data in connection with the services they provide:

- **Device-Specific / Platform-Specific Preferences:** The device and/or platform you use to interact with us (such as you mobile device or social media provider), may provide you additional choices with regard to the data you choose to share with us. For example, many mobile devices allow you to change your device permissions to prevent our products and services from accessing certain types of information from your device (such as your contact lists or precise geolocation data), and many social media platforms allow you to change your platform permissions to prevent integrated products and services from accessing certain types of information connected with your profile. Please refer to your device or platform provider's user guides for additional information about implementing any available platform-specific targeted advertising opt-outs.
- **Google Analytics:** Google Analytics allows us to better understand how our customers interact with our services. For information on how Google Analytics collects and processes data, as well as how you can control information sent to Google, review Google's website here: www.google.com/policies/privacy/partners/. You can learn about Google Analytics' currently available opt-outs, including the Google Analytics Browser Add-On here: <https://tools.google.com/dlpage/gaoptout/>.

Children's Personal Data

Our services are not directed to, and we do not intend to, or knowingly, collect or solicit personal data from children under the age of 18. If an individual is under the age of 18, they should not use our services or otherwise provide us with any personal data either directly or by other means. If a child under the age of 18 has provided personal data to us, we encourage the child's parent or guardian to contact us to request that we remove the personal data from our systems. If we learn that any personal data we collect has been provided by a child under the age of [13], we will promptly delete that personal data.

International Transfers of Personal Data

Avalara may process and store your data in your region or we may transfer it to the United States or to other countries in which we have affiliates, subsidiaries, or service providers. You can find a list of our global offices [here](#). We may transfer data from the European Economic Area and Switzerland to other countries and, when we do, we use legal mechanisms like contracts to make sure there is an adequate transfer mechanism in place.

Data Controller

Avalara is the data controller for some of the personal data described in this Privacy Notice and is located at 512 S Mangum St #100, Durham, NC 27701. Our telephone number is 1-877-814-9390. If you use Avalara's Services through your company or organization, then Avalara may be the data processor with respect to your data and your company or organization may be the data controller.

Monitoring of Incoming Emails

All incoming emails sent to Avalara email accounts will be archived and may be scanned by Avalara and/or our external service providers to detect and prevent threats to our systems, investigate illegal or inappropriate behavior, and/or eliminate unsolicited promotional emails ("spam"). If you have any concerns about this process, please contact us.

Third-Party Websites and Services

Our services may include links to third-party websites, plug-ins, applications and other services. Except where we post, link to or expressly adopt or refer to this Privacy Notice, this Privacy Notice does not apply to any personal data practices of third parties. To learn about the personal data practices of third parties, please visit their respective privacy notices.

Region-Specific Disclosures

We may choose or be required by law to provide different or additional disclosures relating to the processing of personal data about residents of certain countries, regions or states. Please refer below for disclosures that may be applicable to you:

- **California:** If you are a resident of California, please click [here](#) for additional California-specific privacy disclosures, including a description of the personal data rights made available to residents of certain states under applicable law.

Changes to this Privacy Notice

Avalara reserves the right to change this Privacy Notice. When we make changes to the Privacy Notice, we will update this page and change the "last updated" date above.

Contact Us

If you have any questions or complaints about this Privacy Notice, please email us at dataprivacy@avalara.com.