

M3 Global Privacy Policy
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M3 Privacy Policy

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Overview

This Privacy Policy describes M3 Accounting Services, Inc. policies regarding the collection, use, and disclosure of information about you in connection with your use of our website (m3as.com) (the “Site”) and the services provided directly to our contracted Customers (the “Services”). The terms “we”, “us”, and “M3” refers to M3 Accounting Services, Inc., with its headquarters in Lawrenceville, Georgia.

When you use our Services, you consent to our collection, use, and disclosure of information about you as described in this Privacy Policy.

A link to a Portable Document Format (PDF) version of the policy can be found here: <https://www.m3as.com/privacy-policy/>

Information We Collect

M3 collects personal information to facilitate your use of the M3 Site or Services. “Personal Information” means information that identifies or is reasonably capable of identifying an individual, directly or indirectly, and information that is being associated with an identified or reasonably identifiable individual.

Personal Information That We Collect Directly From You

M3 collects the following categories of information directly from individuals:

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Through Its Website

Category of Personal Information
Business contact information (such as your contact name, phone number, and email address, as well as whether or not you are currently an M3 software customer).
Professional information (such as your institution or company).
Nature of your communication, such as the reason for your inquiry, how you have heard about M3, and what software you may currently use for your accounting).
Marketing information (such as your contact preferences, which may include clicking a box to “opt in” to receipt of the M3 newsletter).
Any information you choose to provide to us when completing any ‘free text’ boxes in our forms.
Requests for a demonstration of M3.

Through Its Products and Services with Contracted Customers

Category of Personal Information
Access data: Customer usernames and passwords used to access your account
Usage data: Usage data about you whenever you interact with our Services, which may include the dates and times you access the Services and your browsing activities (such as what portions of the Services you used and session duration).
Log data: Our web servers keep log files that record data each time a device accesses those servers and the nature of each access, including originating IP addresses and your activity in the Service (such as the date/time stamps associated with your usage, pages and files viewed, searches and other actions you take (for example, which features you used)), device event information (such as system activity, error reports, and hardware settings). We may also access metadata and other information associated with files that you upload into our Services.
Support Ticket Information: Any information you include in a support ticket through help.m3as.com.
User Profile Information: Name, Email Addresses, Access Level, Organization, Organization Location, and Organization Department.

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Employee Profile Information: Information Related to Customer employees and the Performance of their employment obligations.
Time Management Information: Information related to the time management of Customer employees.
Customer Support Forums: Forums that allow for support of Customers, including any information you choose to provide to us when completing any 'free text' boxes in our forms.
Vendor Management Information: Information related to the vendors of Customer.

How We Use the Information We Collect

For the general Internet user and potential customer, the Personal Information we collect and the practices described above are undertaken in an effort to provide you with the best experience possible, protect you from risks related to improper use and fraud, and help us maintain and improve M3's offerings. We may use your Personal Information to:

- **Provide you with M3 Services.** M3 uses your Personal Information to provide you with its Site pursuant to its Terms of Use for the Site and this Privacy Policy.
- **Comply with legal and regulatory requirements.** M3 processes your Personal Information as required by applicable laws and regulations.
- **Protect the security and integrity of our Site.** M3 uses your Personal Information to further our security practices related to Personal Information.
- **Provide you with customer support.** M3 processes your Personal Information anytime that you reach out with issues arising from your use of the Site.
- **Optimize and enhance our products and services.** M3 uses your Personal Information to understand how our Site is being used to help us improve our Site.
- **Market our Services to you.** M3 may contact you with information about our Services. We will only do so with your permission, which can be revoked at any time.
- **Other business purposes.** M3 may use your information for additional purposes if that purpose is disclosed to you before we collect the information or if we obtain your consent.

For our Customers, we may use the Personal Information we collect or receive through the Service (alone or in combination with other data we source) for the purposes and on the legal bases identified below:

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- To perform our contract with you for the use of the Services or where we have not entered into a contract with you, in accordance with our legitimate interests to operate and administer our Services.
- To send you system alert messages in reliance on our legitimate interests in administering the Services and providing certain features. For example, we may inform you about temporary or permanent changes to our Services, such as planned outages, or send you account, security or compliance notifications, such as new features, version updates, releases, abuse warnings, and changes to this Privacy Policy.
- To communicate with you about your account and provide customer support to perform our contract with you for the use of the Services or where we have not entered into a contract with you, in reliance on our legitimate interests in administering and supporting our Services.
- To enforce compliance with our Standard Terms and applicable law, and to protect the rights and safety of our Customers in reliance on our legitimate interest to protect against misuse or abuse of our Services and to pursue remedies available.
- To meet legal requirements, including complying with court orders, valid discovery requests, valid subpoenas, and other appropriate legal mechanisms.
- To provide information to representatives and advisors, including attorneys and accountants, to help us comply with legal, accounting, or security requirements in reliance on our legitimate interests.
- To prosecute and defend a court, arbitration, or similar legal proceeding.
- To respond to lawful requests by public authorities, including to meet national security or law enforcement requirements.
- To provide, support, and improve the Services to perform our contract with you for the use of the Services or where we have not entered into a contract with you, in reliance on our legitimate interests in administering and improving the Services and providing certain features. When we share your Personal Information with third parties, we take steps to protect your information in a manner that is consistent with our obligations under applicable privacy laws.
- To combine and anonymize data about our Customers and our Customers' use of the Services in order to create aggregate, anonymized statistics, which we may use to provide certain features within the Services and for promoting and improving the Services in reliance on our legitimate interests.

How We Share the Information We Collect

M3 will not share your Personal Information with third parties, except as described below.

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- **Third-Party Service Providers and Vendors.** M3 may share your Personal Information with third-party service providers for business or commercial purposes. Your Personal Information may be shared so that they can provide us with services, including identity verification, fraud detection and prevention, security threat detection, payment processing, customer support, data analytics, Information Technology, advertising, marketing, data processing, network infrastructure, storage, transaction monitoring, and tax reporting. M3 share your Personal Information with these service providers only so that they can provide us with services, and we prohibit our service providers from using or disclosing your Personal Information for any other purpose. Our third-party service providers are subject to strict confidentiality obligations.
- **Law Enforcement.** M3 may be compelled to share your Personal Information with law enforcement, government officials, and regulators.
- **Corporate Transactions.** M3 may disclose Personal Information in the event of a proposed or consummated merger, acquisition, reorganization, asset sale, or similar corporate transaction, or in the event of a bankruptcy or dissolution.
- **Professional Advisors.** M3 may share your Personal Information with our professional advisors, including legal, accounting, or other consulting services for purposes of audits or to comply with our legal obligations.
- **Consent.** M3 may share or disclose your information with your consent.

If M3 decides to modify the purpose for which your Personal Information is collected and used, we will amend this Privacy Policy.

Cookies

When you access M3's Site or Services, we may make use of the standard practice of placing tiny data files called cookies, flash cookies, pixel tags, or other tracking tools ("Cookies") on your computer or other devices used to visit M3. We use Cookies to help us recognize you as a customer, collect information about your use of M3 Site or Services to better customize our services and content for you, and collect information about your computer or other access devices to assess and improve our Site or Services.

The purposes for which M3 uses Cookies in its Site or Services include:

Purpose	Explanation
Marketing	Used in order to deliver a personalized, responsive service and to improve the user experience when utilizing the site. We would also use the cookies for tracking purposes to

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	allow for products and services searched by a customer or potential customer to be more readily available on return visits or tailored for future marketing and advertising efforts.
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Please note that if you reject cookies, you will not be able to use some or all of M3’s Site or Services. If you do not consent to the placing of Cookies on your device, please do not visit, access, or use the M3 Site or Services.

Your Privacy Rights – General Information

M3 is required under certain domestic and international data laws to provide certain information to individuals about how M3 collects, uses, and shares your Personal Information, and about the rights and choices that you may have concerning your Personal Information. The following sections provide an overview of the Personal Information that M3 collects, uses, and shares; outlines the rights that you have concerning your data; and the actions that you can take to make certain requests concerning your Personal Information.

Personal Information That M3 Collects, Uses, and Shares

For ease of reference, we have compiled the list below to demonstrate how we use the categories of Personal Information we have collected, used, and disclosed.

The purposes for the collection, use, and sharing of information include:

Category of Personal Information	How It Is Collected	How It Is Used	How It Is Shared
Business contact information (such as your contact name, phone number, and email address, as well as whether or not you are currently an M3 software customer)	You have actively provided this information to M3 through the M3 Site or Services.	M3 will use this information to directly respond to your requests through its Site or Services.	M3 does not sell information to third parties. M3 may share information it is provided with third parties or vendors to respond to request or provide further services.

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<p>Professional information (such as your institution or company)</p>	<p>You have actively provided this information to M3 through the M3 Site or Services.</p>	<p>M3 will use this information to directly respond to your requests through its Site or Services.</p>	<p>M3 does not sell information to third parties.</p> <p>M3 may share information it is provided with third parties or vendors to respond to request or provide further services.</p>
<p>Nature of your communication, such as the reason for your inquiry, how you have heard about M3, and what software you may currently use for your accounting)</p>	<p>You have actively provided this information to M3 through the M3 Site or Services.</p>	<p>M3 will use this information to directly respond to your requests through its Site or Services.</p>	<p>M3 does not sell information to third parties.</p> <p>M3 may share information it is provided with third parties or vendors to respond to request or provide further services.</p>
<p>Marketing information (such as your contact preferences, which may include clicking a box and “opting in” to receipt of the M3 newsletter)</p>	<p>You have actively provided this information to M3 through the M3 Site or Services.</p>	<p>M3 will use this information to directly respond to your requests through its Site or Services.</p>	<p>M3 does not sell information to third parties.</p> <p>M3 may share information it is provided with third parties or vendors to respond to request or provide further services.</p>
<p>Any information you choose to provide to us when completing any ‘free text’ boxes in our forms</p>	<p>You have actively provided this information to M3 through the M3 Site or Services.</p>	<p>M3 will use this information to directly respond to your requests through its Site or Services.</p>	<p>M3 does not sell information to third parties.</p> <p>M3 may share information it is provided with third parties or vendors to respond to request or</p>

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			provide further services.
Requests for a demonstration of M3	You have actively provided this information to M3 through the M3 Site or Services.	M3 will use this information to directly respond to your requests through its Site or Services.	M3 does not sell information to third parties. M3 may share information it is provided with third parties or vendors to respond to request or provide further services.

How to Make Data Requests - Information for California Residents

M3 is required under the California Consumer Privacy Act of 2018 (“CCPA”) to provide certain information to California residents about how we collect, use, and share their Personal Information, and about the rights and choices California residents may have concerning their Personal Information. For purposes of this section, “Personal Information” has the meaning provided in the CCPA.

Rights Afforded to California Residents

California consumers have the following rights under the CCPA with respect to their Personal Information. Please understand, however, that these rights are not absolute, and M3 may decline requests as permitted under applicable law.

- **Right to Request Access.** You may submit a request that M3 disclose the categories and specific pieces of Personal Information that we have collected, used, or disclosed about you in the past twelve (12) months.
 - Without having to submit a request to access your Personal Information, you have the right to know what categories of Personal Information we have collected from consumers generally within the past 12 months, where we got it, why we collected it, and with whom we shared it.
 - Please note that simply because M3 has provided the categories of Personal Information it may collect pursuant to California law does not mean M3 necessarily collected all of the specific pieces of Personal Information listed for any given person. Also, please note where Personal Information was disclosed within the past 12 months as indicated in the last column of the table, it may have been disclosed only to service

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providers and/or third parties for business or commercial purposes so we can provide our Site or Services to you.

- We have not “sold” Personal Information within the past 12 months, as that term is defined by the CCPA.
- **Right to Request Deletion.** You may submit a request that M3 delete the Personal Information that we have about you.
- **Right to Opt out of Sale of Personal Information.** You have the right to opt out of the sale of your Personal Information. M3 does not sell your Personal Information.
- **Right Not to Receive Discriminatory Treatment.** You have the right to exercise the privacy rights conferred by the CCPA without discriminatory treatment.

You may submit a request to access or delete your Personal Information by following <https://www.m3as.com/contact/> by emailing us at privacy@m3as.com.

M3 is legally obligated to verify your identity when you submit a request. We may request additional information from you to verify your identity. If you submit a request to delete your Personal Information, you will also be required to confirm the deletion request by email.

You may designate an authorized agent to make a request under the CCPA on your behalf. Your authorized agent must submit proof that you have provided them with power of attorney pursuant to California Probate Code Sections 4000 to 4465. M3 may deny a request from a purported authorized agent who does not provide proof of authorization to act on your behalf.

Please understand that we are not obligated to provide you with a copy of your Personal Information more than twice in a twelve (12) month period pursuant to the CCPA.

How to Make Data Requests – Information for California Residents

To make a data request, you can elect to contact M3 through one of the following methods:

- Email the M3 Privacy Team at privacy@m3as.com or
- Complete the form located at <https://www.m3as.com/contact/>

What happens after I submit a request?

Once we receive your request, we must first verify your identity. We will take commercially reasonable steps to verify your identity, including asking you to provide us with information to confirm your identity using the information we have on file. If you wish to designate an authorized agent to make a request on your behalf, please indicate that when submitting your request.

We will make good faith efforts to respond to your request. There may be circumstances under the CCPA in which we cannot, or need not, respond to your request. For example, we are not

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required to delete Personal Information needed to complete the transaction for which the Personal Information was collected (such as completing a sale), to detect fraudulent or illegal activity, or for legal compliance purposes. We are also not required to provide access or deletion where your identity could not be verified, where you have exceeded the number of requests you can make within a twelve-month period, or where the information contains legally privileged material or would violate the rights of others. If we determine that your request should be restricted in any particular instance, we will provide you with an explanation of why that determination has been made and a contact point for any further inquiries.

Any requests that can be processed by us will be done so in no more than forty-five (45) days from the date we receive your request, unless we notify you that an extension is required. In case of an extended completion period, we will process your request in no more than ninety (90) days from the date of your original request. Consumers are limited to two requests to know/access their Personal Information within a twelve (12) month period.

Information for Subjects of the EU General Data Protection Regulation, the United Kingdom General Data Protection Regulation, and Switzerland

M3 is required under the European Union General Data Protection Regulation (“GDPR”) and the United Kingdom General Data Protection Regulation (UK GDPR) to provide certain information to EU, United Kingdom, and Swiss data subjects about how we collect, use, and share their Personal Information, and about the rights and choices data subjects may have concerning their Personal Information. For purposes of this section, “Personal Information” has the meaning provided in the GDPR.

Rights Afforded to EU, UK, and Swiss Data Subjects

Data subjects have the following rights under the GDPR with respect to their Personal Information. Please understand, however, that these rights are not absolute, and M3 may decline requests as permitted under applicable law.

- **Right to Request Access / Right to Be Informed.** You may submit a request that M3 disclose the categories and specific pieces of Personal Information that we have collected, used, or disclosed about you.
 - Without having to submit a request to access your Personal Information, you have the right to be informed (right to know) what categories of Personal Information M3 has collected from consumers generally, where we got it, why we collected it, and with whom we shared it.
 - M3 has provided a chart that sets this out for you in the Section of this Policy titled “Your Privacy Rights – General Information.” Please note that these are categories of personal information as they are set forth under European Union law. We did not necessarily collect all of the specific pieces of Personal Information listed for any given person. Please note that simply because M3 has provided the categories of Personal Information it may collect does not mean M3 necessarily collected all of the specific pieces of Personal Information listed for any given person.

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- **Right to Request Erasure.** You may submit a request that M3 delete the Personal Information that we have about you.
- **Right to Rectification (Correct or Update Your Personal Information).** You may submit a request that M3 correct or update Personal Information that M3 may have about you.
- **Right to Data Portability.** You may submit a request that M3 provide you with a readily accessible, portable format of the Personal Information M3 may have collected, processed, or stored about you.
- **Right to Object to the Processing.** You may submit a request to M3 to revoke your consent to the processing of the Personal Information M3 may have collected, processed, or stored about you.
- **Right to Restrict Processing.** You may submit a request to M3 to restrict the processing of the Personal Information M3 may have collected, processed, or stored about you.

You may submit a request to access or delete your Personal Information by emailing us at privacy@m3as.com.

M3 is legally obligated to verify your identity when you submit a request. We may request additional information from you to verify your identity. If you submit a request to delete your Personal Information, you will also be required to confirm the deletion request by email.

You may designate an authorized agent to make a request under the GDPR on your behalf. M3 may deny a request from a purported authorized agent who does not provide proof of authorization to act on your behalf.

The right to complain to a data protection authority about the collection and use of Personal Information. For more information, please contact your local data protection authority. Contact details for data protection authorities in the EEA and UK are available [here](#) and Switzerland are available [here](#).

If Personal Information is collected or processed on the basis of consent, the data subject can withdraw their consent at any time. Withdrawing your consent will not affect the lawfulness of any processing we conducted prior to your withdrawal, nor will it affect the processing of your Personal Information conducted in reliance on lawful processing grounds other than consent.

How to Make Data Requests (for EU Data Subjects)

To make a data request, you can elect to contact M3 through one of the following methods:

- Email the M3 Privacy Team at privacy@m3as.com; or
- Complete the form located at <https://www.m3as.com/contact/>

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What happens after I submit a request?

Once we receive your request, we must first verify your identity. We will take commercially reasonable steps to verify your identity, including asking you to provide us with information to confirm your identity using the information we have on file. If you wish to designate an authorized agent to make a request on your behalf, please indicate that when submitting your request.

We will make good faith efforts to respond to your request. There may be circumstances under the GDPR in which we cannot, or need not, respond to your request. For example, we are not required to delete Personal Information needed to complete the transaction for which the Personal Information was collected (such as completing a sale), to detect fraudulent or illegal activity, or for legal compliance purposes. We are also not required to provide completion of a rights request where your identity could not be verified, or where the information contains legally privileged material or would violate the rights of others. If we determine that your request should be restricted in any particular instance, we will provide you with an explanation of why that determination has been made and a contact point for any further inquiries.

Any requests that can be processed by us will be done so in no more than thirty (30) days from the date we receive your request, unless we notify you that an extension is required. In case of an extended completion period, we will process your request in no more than ninety (90) days from the date of your original request.

Information for Nevada Residents

Nevada law (SB 220) requires website operators to provide a way for Nevada consumers to opt out of the sale of certain information that the website operator may collect about them. M3 does not sell your personal information to third parties as defined in Nevada law, and will not do so in the future without providing you with notice and an opportunity to opt-out of such sale as required by law. If you have any questions regarding our data privacy practices or our compliance with Nevada data privacy law, please contact us at privacy@m3as.com.

Retention of Data

Retention of Data

M3 retains Personal Information where we have an ongoing legitimate business or legal need to do so. Our retention periods will vary depending on the type of data involved, but, generally, M3 refer to these criteria in order to determine retention period:

- Whether we have a legal or contractual need to retain the data;
- Whether the data is necessary to provide our Site or Services;
- Whether our Customers have the ability to access and delete the data within their accounts; and
- Whether our Customers would reasonably expect that we would retain the data until they remove it or until their accounts are closed or terminated.

When we have no ongoing legitimate business need to process your Personal Information, we will either delete or anonymize it or, if this is not possible (for example, because your Personal

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Information has been stored in backup archives), then we will securely store your Personal Information and isolate it from any further processing until deletion is possible.

Children's Privacy

M3's Site and Services are not intended for general audiences and is not directed to children under 17. We do not knowingly collect Personal Information from children under 17 through the Site. If you become aware that a child has provided us with Personal Information without parental consent, please contact us at privacy@m3as.com. If we become aware that a child under 17 has provided us with Personal Information without parental consent, M3 takes steps to remove such information.

Security

No security is foolproof, and the Internet is an insecure medium. We cannot guarantee absolute security, but we work hard to protect M3 and you from unauthorized access to or unauthorized alteration, disclosure, or destruction of Personal Information that we collect and store.

M3 addresses its guarantees as to privacy and security in the various agreements and data processing addendum that it enters into contractually with its Customers.

Third Party Websites

The M3 Site contains links to the social networks Facebook, LinkedIn, Twitter, and YouTube. M3 disclaims any and all liability and responsibility for your use of these sites but encourages you to review their individual privacy policies before your use of these sites.

Advertising and Marketing to You

Subject to applicable laws and regulations, M3 may from time to time send direct marketing materials promoting services, products, facilities, or activities to you using information collected from or about you. You have to voluntarily opt-in to receive these communications, and you may opt-out of such communications at any time by emailing info@marketing@m3as.com.

You may also opt-out of such communications by following the directions provided in any marketing communication.

Updates to This Privacy Policy

M3 may revise this Privacy Policy from time to time. If M3 makes material changes to this Privacy Policy, we will notify you by email or by posting a notice on our Site prior to or on the effective date of the changes. By continuing to access or use the services after those changes become effective, you acknowledge the revised Privacy Policy.

Contact Information

If you have questions or concerns regarding this policy or our processing of your Personal Information, please feel free to contact M3 through the following:

Email: privacy@m3as.com

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Address:

1715 N. Brown Rd., Bldg. A
Suite 200
Lawrenceville, GA 30043