

## **CBIZ California Privacy Notice**

**Effective Date: January 1, 2022**

This CBIZ (“**CBIZ**,” “**Company**,” “**us**,” “**we**,” or “**our**”) California Privacy Notice (“**Notice**”) is provided pursuant to California privacy laws. This Notice supplements CBIZ’s other privacy policies and notices, including our main **Privacy Policy** (<https://www.cbiz.com/privacy-policy>) to the extent that our service links to this Notice and/or our main Privacy Policy. In the event of a conflict between any other Company policy, statement, or notice and this Notice, this Notice will prevail as to California consumers and their rights under California privacy law. This Notice applies solely to residents in the State of California that access or otherwise use the service linking to this Notice. This Notice does not apply specifically to CBIZ job applicants, employees, or business contacts, to the extent that they do not access or use the service linking to this Notice.

The following is a description of our personal information practices for the 12-month period prior to the Effective Date of this Notice, as set forth above. Additional privacy notices CBIZ provides to you at the time of collection of your information may also contain information about our practices. We reserve the right to amend this Notice at our discretion and at any time. When we make changes to this Notice, we will update the date of this Notice above. We will provide more specific reasonable notice at our discretion (e.g., a banner, pop up, or email to you) if we materially change this Notice.

### **1. PERSONAL INFORMATION WE COLLECT & WHY WE COLLECT IT**

We may collect your personal information directly from you when you provide us information online, through electronic forms, over the phone, or through paper documents; automatically through our online services via cookies and other tracking technologies; from our service providers, vendors and suppliers, our affiliates, or other individuals and businesses; from third-party sources, such as data providers; and from public sources of data, such as government databases.

Note that the specific pieces of personal information we collect may vary depending on the nature of your interactions with us and may not include all of the examples listed below.

| <b>Category of Personal Information</b> | <b>Examples</b>  |
|---|--|
| <b>Identifiers</b>                      | Name, postal address, Internet Protocol (IP) address, email address, username and password for our online services, mobile device identifiers                      |
| <b>Personal Records</b>                 | Telephone number, driver’s license or state identification card number, bank account number, credit card number, debit card number, or other financial information |
| <b>Protected Legal Characteristics</b>  | Race, sex at birth, ethnicity, military/veteran status, marital status, religion, and disability   |
| <b>Commercial Information</b>           | Products or services purchased, obtained or considered, other purchasing or consuming histories or tendencies, communications channel preferences                  |

| Category of Personal Information                                 | Examples  |
|--|---|
| <b>Internet or Other Electronic Network Activity Information</b> | Browsing and search history on our websites, and information regarding interaction with an internet website, application, or advertisement, browser type and language, operating system, internet or mobile network provider, website access time, duration of visit, referring website address |
| <b>Geolocation Data</b>  | Your physical location based on information you provide directly or inferred from your IP address or other device identifier  |
| <b>Sensory Data</b>  | Audio recordings of customer service calls or similar information   |
| <b>Professional Information</b>                                  | Job title, employer name  |
| <b>Inferences</b>  | Inferences regarding preferences, characteristics, psychological trends, predispositions, behavior, and attitudes   |

We may collect the personal information above for the following purposes, including without limitation:

- managing interactions and transactions, performing services and operations and providing benefits, processing interactions, tailor our communications with you, provide marketing materials
- recognizing you when you use our online services, audit and improve the service and for any other internal business purpose, to detect and prevent fraud
- corporate and internal research and development
- performing and selling services, personalizing services, and quality assurance
- fulfilling, responding to, and documenting consumer and privacy rights requests, auditing anonymous users, and customer service
- processing payments/financing, advertising, and incentivizing purchases.
- processing medical issues, and government paperwork
- safety and security
- debugging and detecting security incidents or abnormalities

In addition, we may collect, use, and disclose your personal information as required or permitted by applicable law. We reserve the right to convert, or permit others to convert, your personal information into deidentified data or aggregate consumer information, as permitted by law.

**2. DISCLOSURE OF PERSONAL INFORMATION**

We may disclose all categories of personal information described above to our affiliates, service providers (e.g., customer service agencies, video or call recording agencies, security agencies, marketing firms and agencies, data analytics firms, referral agency(ies), website hosts), healthcare providers, banking partners, business partners (e.g., banking partners offering financing), external auditors, vendors, and government entities.

When we disclose personal information, we strive to enter into a contract requiring the recipient to keep that personal information confidential and only use it as necessary to perform business purposes (as opposed to commercial purposes), or as otherwise permitted by applicable law. Our service providers may engage subcontractors to enable the service providers to perform services for us.

We do not knowingly sell any category of personal information set forth above but note that we may disclose personal information (identifiers, commercial information, internet or other electronic network activity information, geolocation) to vendors that facilitate interest-based advertising and other advertising and marketing. These vendors may use your personal information for co-marketing purposes or to promote other products and services that may interest you, and these vendors may include advertising partners and social media platforms for the purposes of ad targeting, remarketing, and customized advertising content, and data cooperatives and exchanges. For more information, see the “Do Not Sell Rights” section below.

We do not knowingly sell (without affirmative authorization) the personal information of persons who we are aware are minors under 16 years of age.

We may disclose personal information to our affiliates (any parent, subsidiary, or affiliate of ours), for their direct marketing purposes. You may opt out or request information on our sharing of customer personal information with affiliates for the recipient affiliates’ own marketing purposes in the prior 12 months to the extent you are entitled by California law, by contacting us [here](#) or by sending a letter to CBIZ, Inc., P.O. Box 31420, Independence, OH 44131 (Attention: Legal Counsel/Privacy). Any such request must include "California Privacy Rights Request" in the first line of the description and include your name, street address, city, state, and ZIP code. Please note that we are only required to respond to one request per customer each year, and we are not required to respond to requests made by means other than through this email address or mail address.

### **3. CALIFORNIA PRIVACY RIGHTS**

California residents have certain rights which they may exercise independently or through an authorized agent. Certain rights requests are subject to an identification and verification process, in which case we will not fulfill a request unless we have been provided sufficient information for us to reasonably verify the identity of the requestor and the validity of the request. Please promptly respond to any follow-up inquiries so that we may verify your identity.

Authorized agents who meet the agency or power of attorney requirements under law may submit requests on behalf of a California resident. We may require authorized agents to (1) provide a verifiable written authorization from the California resident that the agent has the resident’s permission to submit the request; and (2) independently verify the agent’s own identity with us.

Note that if some of the personal information we maintain about a California resident is not sufficiently associated with personal information we have verified to be related to the identity of the requestor, we will not include such information in response to the request. If we cannot comply with a request, we will explain the reasons in our response.

You are not required to create a password-protected account with us to make a verifiable request, but if you have a password-protected account with us, you may be able to use your account to do so, if our online service allows you to. Refer to the online service through which you have the password-protected account with us for more information.

Please note we are not obligated to comply with requests to the extent that doing so would infringe on our, or any other person’s or party’s, rights, or conflict with applicable law.

If you have an account with us, we may deliver our written response to that account, or by mail or electronically. If you do not have an account with us, we will deliver our written response by mail or electronically. Any disclosures we provide need only cover the 12-month period preceding the verifiable

request's receipt. We reserve the right to explain the reasons we cannot comply with a request, if applicable.

We do not charge a fee to process or respond to your verifiable consumer request unless it is excessive, repetitive, or unfounded, in which case we may limit the response and/or condition it on payment of our costs. If we determine that the request warrants a fee, we will tell you why we made that decision and provide you with a cost estimate before completing your request.

Please note that personal information is retained by us for various time periods, including transient or short periods, so we may not be able to fully respond to what might be relevant to your request.

**To submit a request**, please email us at [webprivacy@CBIZ.com](mailto:webprivacy@CBIZ.com) or call (866) 568-4109.

#### **a. THE RIGHT TO KNOW**

**i. Information on Categories of Personal Information:** California residents have the right to request, no more than twice in a 12-month period, any of the following for the 12-month period prior to your request date:

- The categories of personal information we have collected, used, disclosed, and sold about you.
- The categories of sources from which we collected your personal information.
- The business or commercial purposes for collecting or selling your personal information.
- A list of the categories of personal information disclosed for a business purpose in the prior 12 months, along with the categories of recipient for each category of personal information, or that no disclosure occurred.

If we cannot verify your identity to a reasonable degree of certainty, we will not deliver the category information, but will refer you to the "Personal Information We Collect & Why We Collect It" (Section 1) above. Note that we may also choose to not provide categories of personal information if an exception under law applies. For example, without limitation, where we do not maintain the personal information in a searchable or reasonably accessible format and where we maintain the personal information solely for legal or compliance purposes.

**ii. Obtaining Specific Pieces of Personal Information:** California residents have the right to request a transportable copy, no more than twice in a 12-month period, of specific pieces of personal information that we have accessed (in the 12-month period prior to the request date). In order to protect the privacy and data security of individuals, we will require a high degree of certainty that we have verified that a requester is the requesting California resident or the resident's authorized agent. If you are unable to meet that standard, we will automatically treat the request as an "information on categories of personal information" request. Note that we may also choose to not provide specific pieces of personal information if an exception under law applies. For example, without limitation, where we do not maintain the personal information in a searchable or reasonably accessible format and where we maintain the personal information solely for legal or compliance purposes.

In addition, consistent with applicable law and our interest in the security of your personal information, we will not deliver to you your social security number, driver's license number, or other government-issued identification number, financial account number, any health or medical identification number, an account password, or security questions or answers in response to a request.

#### **b. RIGHT TO OPT OUT OF "SALES" OF PERSONAL INFORMATION**

You have the right to opt out of the sale of your personal information. Once we receive and confirm your verifiable consumer request, we will refrain from selling personal information we collected about you.

We do not knowingly sell personal information related to California residents, but we may disclose personal information to vendors that facilitate interest-based advertising and other advertising and marketing through cookies or other tracking technologies through our online services. We may offer you information about ways to control cookies or other tracking technologies associated with our online services, such as through a tracking technologies preferences tool. For more information on tracking technologies and your choices regarding them, including certain interest-based advertising, see the main [Privacy Policy](#).

Note that we may disclose your personal information for the following purposes, which are not a sale under law: (i) if you direct us to share personal information; (ii) to comply with your rights requests; (iii) as part of a merger or asset sale; and (iv) as otherwise required or permitted by applicable law.

#### **c. RIGHT TO DELETE**

You may request that we delete your personal information. Once we receive and confirm your verifiable consumer request, we will delete (and direct our service providers to delete) your personal information from our records, unless an exception applies. For example, we may retain some or all of your personal information that you request to be deleted, without limitation, to complete transactions and services you have requested or that are reasonably anticipated, for security purposes, for legitimate internal business purposes, including maintaining business records, to comply with applicable laws and regulations, to exercise or defend legal claims, and to cooperate with law enforcement. We may require a reasonable or high degree of certainty that the requester is the consumer for which a deletion request is applicable, depending on the sensitivity of the personal information.

#### **d. NON-DISCRIMINATION**

We will not discriminate against you in a manner prohibited by law for exercising any of your California privacy rights.

### **4. HOW TO CONTACT US**

For more information about your California privacy rights, please contact us by email at [webprivacy@cbiz.com](mailto:webprivacy@cbiz.com) or at CBIZ, Inc., P.O. Box 31420, Independence, OH 44131 (Attention: Legal Counsel/Privacy).