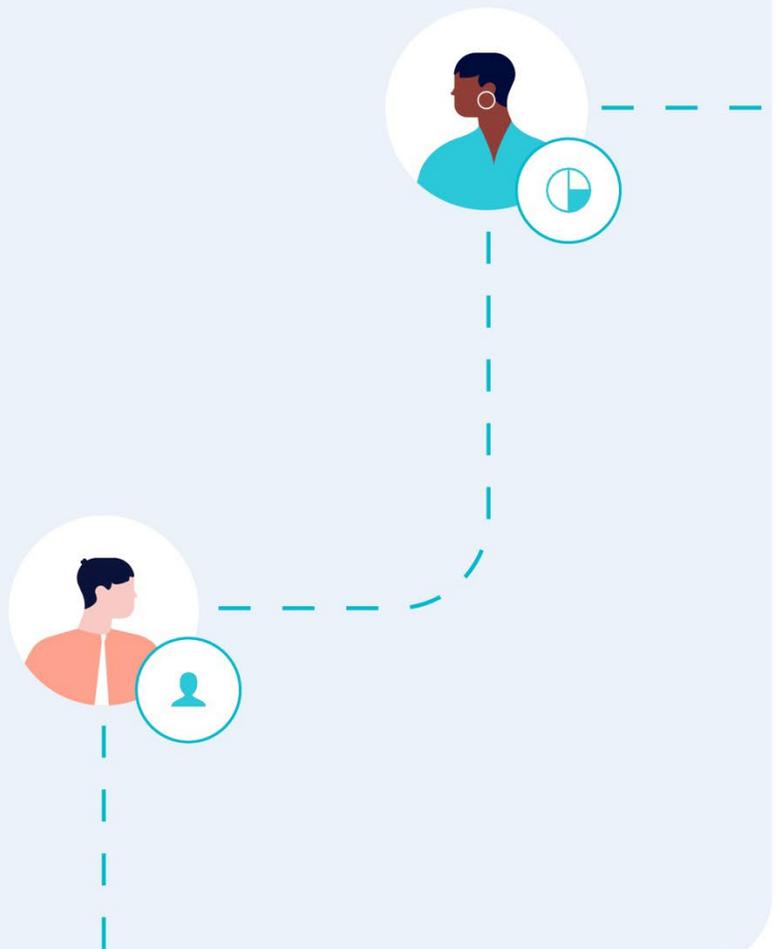


LAST UPDATED: JANUARY 2026

Privacy Policy



Practifi – Privacy Policy

Cloudpractice Pty Ltd and Practifi, Inc., each trading as Practifi, together with their respective subsidiaries and affiliates (collectively, "Practifi" or the "Company", "We", "Us", "Our") are committed to secure and trustworthy Internet commerce and the individual's right to privacy. This Privacy Statement describes how we handle your personal information.

We urge you to read this Privacy Policy so that you understand our commitment to you and your privacy, and how you can participate in that commitment. When you visit our Websites (defined below) or provide personal information to us through other means, you consent to the use of your information as described in this Privacy Policy.

This Privacy Policy forms part of Practifi's [Master Subscription Agreement](#) which is incorporated herein by reference.

Introduction

This Policy details our commitment to protecting the privacy of individuals who:

- a. visit our websites ("Website Visitors") or individuals who request us to contact them via our online web forms;
- b. who register to use the products and services which we market for subscription available at www.Practifi.com (the "Service(s)"); or
- c. attend or register to attend webinars, sponsored events or other events at which Practifi participates ("Attendees").

For the purposes of this Policy, the term "Websites" shall refer collectively to www.practifi.com as well as the other websites that Practifi operates and that link to this Policy. This Policy describes how We collect, use, share and secure the personal information that you provide. It also describes your choices regarding use, access and correction of your personal information.

Our websites may contain links to other websites. We are not responsible for the information practices or the content of such other websites. If you submit personal information to any of those sites, your information is governed by their privacy statements. We encourage you to read the privacy statement of any website you visit carefully.

Our Role in Processing Personal Information

Practifi acts in different capacities depending on the type of personal information:



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As a **Data Controller**: For information we collect directly (website visitors, prospective customers, business contacts, billing contacts), we determine how and why personal information is processed.

As a **Data Processor**: For customer data stored in the Practifi Service, we process personal information on behalf of our customers according to their instructions and our Master Subscription Agreement. In these cases, our customers are the data controllers.

Information Collected

The types of personal information that We might collect from you include, without limitation:

- name;
- mailing address;
- telephone numbers;
- e-mail address;
- website use preferences;
- opinions about our products;
- username, password and other login information; and
- other contact or identifying information,

about you.

You are not required to provide us with such information, but certain features of the Websites may not be accessible or available, absent the provision of the requested information.

When expressing an interest in obtaining information about Practifi and its products and services, We will ask for personal contact information.

As you navigate the Company's Websites, We may also collect information through the use of commonly used information-gathering tools such as web beacons and cookies. Information collected includes standard information from your web browser such as your IP address, browser type, operating system, referring/exit pages, links clicked and actions taken while browsing.

When you purchase the Company's products or services, We will collect billing and profile information.



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Information Automatically Collected

We also may receive and store certain information about you and your device(s) automatically when you access or use the Websites. This information may include:

Technical Information – We may collect technical information associated with your activity on the Websites and may include information related to your browser and operating system, IP address (the Internet address of your computer) unique device identifiers, and other information such as your device type. We use such information for diagnostic and statistical purposes and to administer the Websites and the services provided through the website.

Usage Information – We may collect information to better understand customer traffic patterns usage of the Websites. This may include the webpage that you were visiting before accessing the Websites, the pages or features of the Websites that you browsed, to inform us which part of the Websites you visit and how much time you spend there. This information is used to analyze and improve the Websites and to provide our customers with a better user experience.

User Preferences – We collect information about your preferences to make your use of the Websites more productive using cookies.

Where applicable, you may opt out of having your personal information used or disclosed for a specific purpose at any time by emailing the Privacy Officer at the contact information provided in the ‘Contacting Us’ section, at the contact details below.

Use of Information Collected

We may use the information we collect about you (including personal information, where applicable) to perform our obligations under our Master Subscription Agreement with you and based on our legitimate interest, including to:

- a. provide, operate, maintain, improve, and promote the Websites and the Services;
- b. enable you to access and use the Websites and the Services;
- c. process and complete transactions and send you related information, including purchase confirmations and invoices;
- d. send transactional messages, including responses to your comments, questions, and requests; provide customer service and support; and send you technical notices, updates, security alerts, and support and administrative messages;



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- e. send promotional communications, such as providing you with information about products and services, features, surveys, newsletters, offers, promotions, contests, and events; and provide other news or information about us and our partners (you can opt-out of receiving marketing communications from us by following the unsubscribe instructions included in our marketing communications);
- f. monitor and analyze trends, usage, and activities in connection with the Websites and Services and for marketing or advertising purposes;
- g. investigate and prevent fraudulent transactions, unauthorized access to the Websites and the Services, and other illegal activities;
- h. personalize the Websites and Services, including by providing features or advertisements that match your interests and preferences; and
- i. for other purposes for which we obtain your consent.

We use various technologies, including AI and automation tools, to operate and improve our Services. Personal information processed by these technologies is subject to the same protections described in this Privacy Policy.

Legal basis for processing Personal Information (EEA Visitors)

Our legal basis for collecting and using the personal information described above will depend on the personal information concerned and the specific context in which we collect it. However, we will normally collect personal information from you only where we have your consent to do so, where we need the personal information to perform a contract with you, or where the processing is in our legitimate interests and not overridden by your data protection interests or fundamental rights and freedoms. In some cases, we may also have a legal obligation to collect personal information from you.

If we ask you to provide personal information to comply with a legal requirement or to perform a contract with you, we will make this clear at the relevant time and advise you whether the provision of your personal information is mandatory or not (as well as of the possible consequences if you do not provide your personal information). Similarly, if we collect and use your personal information in reliance on our legitimate interests (or those of any third party), we will make clear to you at the relevant time what those legitimate interests are.

Sharing of Information Collected

Service Providers

We share information, including personal information, with our third-party service providers that we use to provide hosting for and maintenance of our Websites, application development, backup, storage, payment



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processing, analytics and other services for us. These third-party service providers may have access to or process your personal information for the purpose of providing these services for us. We do not permit our third-party service providers to use the personal information that we share with them for their marketing purposes or for any other purpose than in connection with the services they provide to us.

We may also share aggregated and/or anonymized information regarding your use of the Services with third parties for marketing purposes based on our legitimate interest to develop and promote Service(s). However, we would never identify you, your Agents or End-Users as the source of the information.

We may collect, and we may engage third-party analytics providers to collect, metrics and information regarding your use of the Service, including evaluating how Agents and End-Users use the Service ("Usage Data"), to develop new features, improve existing features or inform sales and marketing strategies, based on our legitimate interest to improve the Services. When we process Usage Data, any personal information shall be anonymized. Any such third-party analytics providers will not share or otherwise disclose Usage Data, although we may make Usage Data publicly available from time to time.

Compelled Disclosure

We reserve the right to use or disclose your Personal Information if required by law or if we reasonably believe that use or disclosure is necessary to protect our rights, protect your safety or the safety of others, investigate fraud, or comply with a law, court order, or legal process.

International Transfer of Information Collected

To facilitate Practifi's global operations, the Company may access, store, transfer, use, process, and disclose such information from around the world, including from other countries in which the Company has operations or where its service providers are located. This Privacy Statement shall apply even if Practifi transfers data about customers to other countries.

Website Navigational Information

Practifi uses commonly-used information-gathering tools, such as cookies and web beacons, to collect information as you navigate Our Websites ("Website Navigational Information"). This section describes the types of website navigational information that may be collected on the Company's Websites and how this information may be used.



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Cookies and Other Tracking Technologies

We use cookies, beacons, tags and similar technologies to analyze trends, administer the site, track users' movements around the site and gather demographic information about our user base. A cookie is a small text file stored on your computer for record-keeping purposes. We use both session cookies (which expire when you close your browser) and persistent cookies (which remain on your device) to enhance your browsing experience and provide site functionality.

You can control cookies through your browser settings and delete cookies already on your computer. However, if you disable cookies, some features of our site may not function properly.

Web Beacons and Log Files

We may use web beacons in conjunction with cookies to understand how visitors use our Websites and interact with our emails. Web beacons are small electronic images that recognize certain types of information on your device, such as cookies and page views. We may also automatically collect standard web log information including IP addresses, browser type, internet service provider, referring/exit pages, operating system, and date/time stamps. This information is used to analyze trends, administer the site, and improve our Services.

Your Data

From time to time Practifi's customers may submit data or information to the Practifi Service for hosting and processing purposes. We will not review, share, distribute, or reference any such data except as provided in Our Master Subscription Agreement, or as may be required by law. In accordance with Our Master Subscription Agreement, We may access such data only for the purpose of providing the Service, preventing or addressing service or technical problems, at a customer's request in connection with customer support matters, or as may be required by law.

Service Provider, Sub-Processors/Onward Transfer

We may transfer personal information to companies that help us provide our Service. Transfers to subsequent third parties are covered by the provisions in this statement regarding notice and choice and the service agreements with our customers.

Integrated Systems

Practifi's customers may integrate other systems, including those available via the Salesforce.com AppExchange, into the Practifi Service for their own business purposes. We have no visibility over the privacy



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controls within those systems. Practifi's customers should familiarize themselves with the privacy controls of those systems.

Access to Data Controlled by our Customers

Typically, Practifi is a data processor and has no direct relationship with the individuals whose personal data it processes. An individual who seeks access, or who seeks to correct, amend, or delete inaccurate data should direct queries to the appropriate Practifi customer. If a customer requests our assistance in the removal of data we will respond to such requests within 15 business days.

Data Retention

We retain personal information for as long as necessary to fulfill the purposes described in this Privacy Policy, unless a longer retention period is required or permitted by law. The criteria we use to determine retention periods include:

- The length of time we have an ongoing relationship with you
- Whether there is a legal obligation to which we are subject
- Whether retention is advisable in light of our legal position

Upon request, we will delete personal information unless we are required to retain it by law or for legitimate business purposes. Requests for deletion can be submitted to privacy@practifi.com.

Salesforce.com

Practifi's customer data and the data stored by Our customers is stored on Salesforce.com. Practifi customers should ensure they have read and understood Salesforce.com's privacy policy as published at their website www.salesforce.com.

Security

The security of your personal information and our customers' information is important to us. When you enter sensitive information (such as login credentials) on our platform login, we encrypt the transmission of that information using industry standard TLS. We follow generally accepted industry standards to protect the personal information submitted to us, both during transmission and once we receive it. No method of transmission over the Internet, or method of electronic storage, is 100% secure, however. Therefore, we cannot guarantee its absolute security. If you have any questions about our security you can contact us at privacy@practifi.com.



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We take reasonable physical, technological and organizational precautions to prevent the loss, misuse, unauthorized access, or modification of personal information under our control. For example:

- Only our service providers and employees who need to know your personal information to perform a specific task (e.g. processing a payment) are granted access to that information.
- The computers and servers where your personal information is stored are kept in a secure environment, are password-controlled with limited access, and have industry standard firewalls and anti-virus software installed.
- Laptops, USB keys, mobile phones and other electronic wireless devices used by our employees who need your personal information are password protected. We encourage such persons not to store personal information on such devices unless it is reasonably necessary for them to do so to perform a specific task.
- We train our employees to comply with this Privacy Policy and periodically conduct audits to ensure ongoing compliance and to determine the effectiveness of our privacy management practices.

Security Incident Notification

In the event of a security incident that affects personal information, we will notify affected individuals and relevant regulatory authorities as required by applicable law. We maintain an Incident Response Plan that guides our response to security incidents.

Updating your Personal Information

To review and update your personal information to ensure it is accurate, contact us at privacy@Practifi.com. We will respond to all requests for access, to correct inaccurate data, update information, or delete information within 15 business days.

If you would like to update or change your password, you may click on the "Forgot your password?" link on the login page. You will be required to provide your username then a system generated password will be created and sent to the email address indicated on your profile. The email will contain a link where you can change your password.

Children under the Age of 13

Our Website is not intended for children under 13 years. We do not knowingly collect personal information from children under 13 without parental consent. No one under age 13 may provide any personal information to or on our Website.



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If you are under 13, do not:

- Use or provide any personal information on our Website or on or through any of its features
- Register on our Website, make any purchases through our Website
- Use any of the interactive or public comment features of our Website, or
- Provide any personal information about yourself to us, including your name, address, telephone number, email address, or any screen name or user name you may use.

If we learn we have collected or received personal information from a child under 13 without verification of parental consent, we will delete that personal data. If you believe we might have any personal information from or about a child under 13, please contact our Privacy Officer.

California Privacy Rights

This section applies only to California consumers. The California Consumer Privacy Act ("CCPA") requires businesses to disclose whether they sell Personal Data. Practifi is a business, and does not sell Personal Data. We may share Personal Data with third parties if those third parties are authorized service providers or business partners who have agreed to our contractual limitations as to their retention, use, and disclosure of such Personal Data.

If you are unable to access this Privacy Policy due to a disability or any physical or mental impairment, please contact us and we will supply you with the information you need in an alternative format that you can access.

For purposes of this section "Personal Information" has the meaning given in the California Consumer Privacy Act ("CCPA").

How We Collect, Use, and Share your Personal Information

We have collected the following statutory categories of Personal Information in the past twelve (12) months:

- a. Identifiers, such as name, e-mail address, mailing address, and phone number. We collect this information directly from you or from third party sources.
- b. Commercial information, such as subscription records. We collect this information directly from you.
- c. Internet or network information, such as browsing and search history. We collect this information directly from your device.
- d. Geolocation data, such as IP address. We collect this information from your device.



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- e. Financial information, such as Payment Information or financial account numbers in the process of providing you with a subscription. We collect this information from you.
- f. Inferences.
- g. Other personal information, in instances when you interact with us online, by phone or mail in the context of receiving help through our help desks or other support channels; participation in customer surveys or contests; or in providing the Subscription Service.

The business and commercial purposes for which we collect this information are described in the 'Use of Information Collected' section. The categories of third parties to whom we "disclose" this information for a business purpose are described in 'Sharing of Information Collected' section.

Your California Rights

You have certain rights regarding the Personal Information we collect or maintain about you. Please note these rights are not absolute, and there may be cases when we decline your request as permitted by law.

The right of access means that you have the right to request that we disclose what Personal Information we have collected, used and disclosed about you in the past 12 months.

The right of deletion means that you have the right to request that we delete Personal Information collected or maintained by us, subject to certain exceptions.

The right to non-discrimination means that you will not receive any discriminatory treatment when you exercise one of your privacy rights.

How to Exercise your California Rights

You can exercise your rights yourself or you can alternatively designate an authorized agent to exercise these rights on your behalf. Please note that to protect your Personal Information, we will verify your identity by a method appropriate to the type of request you are making. We may also request that your authorized agent have written permission from you to make requests on your behalf, and we may also need to verify your authorized agent's identity to protect your Personal Information.

Rights of European Economic Area (EEA) and United Kingdom Residents

This section applies to individuals located in the European Economic Area (EEA) and the United Kingdom.



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Your Rights

If you are located in the EEA or UK, you have the following rights regarding your personal information:

Right of Access: You have the right to request confirmation of whether we process your personal information and to receive a copy of that information.

Right to Rectification: You have the right to request correction of inaccurate or incomplete personal information.

Right to Erasure: You have the right to request deletion of your personal information in certain circumstances.

Right to Restrict Processing: You have the right to request that we restrict processing of your personal information in certain circumstances.

Right to Data Portability: You have the right to receive your personal information in a structured, commonly used, and machine-readable format and to transmit it to another controller.

Right to Object: You have the right to object to our processing of your personal information based on legitimate interests, including processing for direct marketing purposes.

Right to Withdraw Consent: Where we rely on your consent to process personal information, you have the right to withdraw that consent at any time.

Right to Lodge a Complaint: You have the right to lodge a complaint with your local data protection supervisory authority.

Response Timeframes

We will respond to requests to exercise these rights within thirty (30) calendar days of receiving your request. In complex cases, we may extend this period by an additional sixty (60) days and will notify you of any such extension.

For Practifi Customers

If you are a customer of Practifi, additional data protection terms are set forth in our GDPR Data Processing Addendum to our Master Subscription Agreement. Please contact your Practifi account representative or privacy@practifi.com for more information.



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Exercising Your Rights

To exercise any of these rights, please contact us at privacy@practifi.com or at the postal addresses listed in 'Contacting Us' section below. We will verify your identity before processing your request.

Changes to this Privacy Statement

We reserve the right to update this Privacy Policy to reflect changes to our information practices. We will provide notification of material changes to this statement by updating the "Effective" date at the top of this Privacy Statement. We encourage you to periodically review this page for the latest information on our privacy practices.

Contacting Us

Questions regarding this Privacy Statement or the information practices of the Company should be directed to our Privacy Officer:

For Asia-Pacific Region: Privacy Officer Cloudpractice Pty Ltd (trading as Practifi) PO Box Q217, Queen Victoria Building, Sydney, 1230, NSW, Australia] Australia Email: privacy@practifi.com

For North America: Privacy Officer 226 N Morgan St, Ste 500, Chicago IL, 60607 United States Email: privacy@practifi.com

We will respond to all privacy-related inquiries within fifteen (15) business days for general inquiries, or within thirty (30) days for data-subject access requests from EEA/UK residents.

