Privacy Notice

Last updated: November 18, 2026

This is an English translation of our Spanish-language privacy notice (aviso de privacidad integral), which is issued under Mexican law. If the two versions differ, the Spanish version prevails.

1. Who is responsible for your personal data?

Miguel Martinez Silva, an individual registered in Mexico as a business taxpayer (*persona física con actividad empresarial*) who provides accounting and tax services under the trade name **taxmxus** ("taxmxus", "we"), with an address for notices at **Blvd. Francisco Zarco 15770, San Antonio de los Buenos, C.P. 22667, Tijuana, Baja California, Mexico**, is the data controller responsible for your personal data.

Privacy contact: **contact@taxmxus.com** (also contacto@taxmxus.com).

2. What personal data do we process?

a) If you contact us through our website, booking page, email or WhatsApp (prospective clients):

- Identification and contact details: name, email address, phone number (if you message us on WhatsApp), country of residence and preferred language.
- Your type of case and anything you tell us in your message or in the intro call. **This may include financial or property information** (for example, that you sold or rent out a property, or the types of income you receive).
- Your image and voice during video calls, which we don't record.
- Technical data about your visit: IP address, browser and device type, pages visited and, **only if you accept analytics cookies**, Google Analytics identifiers (see section 8).

b) If you hire us (clients):

- Identification and contact details: name, address, date of birth, nationality, marital status, official ID, tax residence and immigration status to the extent your returns require them.
- Tax identifiers: Mexican RFC and CURP, US Social Security number (SSN) or ITIN, and those of your spouse and dependents when applicable.
- **Financial and property data:** income, wages, pensions, rents, investments, bank accounts and balances, real estate, sales, withholding, taxes paid, debts, prior returns and tax documents, and bank details for refund deposits.
- Data about other people you give us (spouse, dependents, tenants, buyers). You agree to have their permission or to inform them of this notice. Data about minors is processed only for dependents and through their parent or guardian.

Sensitive personal data: we don't ask for it. However, some receipts you choose to give us for deductions (for example, medical or hospital expenses) may reveal information about your **health**. We will only process them if you provide them and give us your **express written consent**, which we obtain in the engagement letter.

3. What do we use your data for?

Necessary purposes (we can't serve you without them):

Prospective clients:

1. Answer your message and schedule the free intro call.
2. Understand what you need to file in each country and send you a quote and an engagement letter.

Clients:

3. Prepare, review, sign and file your returns and reports with the IRS, the California Franchise Tax Board, FinCEN and the SAT, and related filings such as an ITIN application (Form W-7).

4. Represent you before tax authorities to the extent the law allows, and respond to their requests.
5. Issue invoices (CFDI), collect our fees and keep our books.
6. Comply with the firm's legal obligations in Mexico and the United States, including keeping files and workpapers.
7. Protect the security of information and prevent fraud.

Secondary purposes (not necessary for our services; you can opt out without affecting your relationship with us):

8. Send you newsletters about tax changes and other taxmxus services.
9. Measure website use with Google Analytics, **only if you accept analytics cookies**.

How to opt out of secondary purposes: leave the newsletter box unchecked on our form, click "Reject" in the cookie banner, use the unsubscribe link in any newsletter, or email contact@taxmxus.com. If our first contact was not in person or through our form, you have five business days to opt out through the same channel.

US tax return information: we use and disclose it only as US federal law allows (26 U.S.C. §7216). We won't use it to offer you services other than tax return preparation, or disclose it for other purposes, without your prior written consent.

4. Who do we share your data with?

a) Transfers that don't require your consent (article 36 of Mexico's Federal Law on the Protection of Personal Data Held by Private Parties):

- Tax and financial authorities (the IRS, the California Franchise Tax Board, FinCEN, the SAT and other competent authorities), when we file your returns, reports and applications or respond to a request. These transfers are provided for by law and necessary to perform our contract with you.
- Courts or government authorities, when there is a valid order or legal mandate.

b) Transfers that require your consent:

- A US-licensed professional, if your case needs representation or advice we can't provide. We'll ask for your express written consent first, in a separate document.

☐ **I accept** ☐ **I do not accept** the transfer of my data in the case described in b), when I authorize it in writing for a specific matter.

c) Service providers that process data on our behalf: these are not transfers and don't require your consent. They process your data only on our instructions and under confidentiality and security obligations. Some are **outside Mexico**:

- Website hosting and email: Hostinger (servers in the United States).
- Appointment booking: Calendly (United States).
- Video calls: Zoom (United States).
- Website analytics, only if you accept: Google Analytics (Google).
- Encrypted document portal and e-signature: Verifyle; backup encrypted email: Proton Mail.
- Instant messaging, for quick questions only: WhatsApp (Meta).
- Mail and courier services that carry your sealed returns to the IRS (USPS and, if you ask, DHL, FedEx or UPS).

5. How can you limit the use or disclosure of your data?

- Email **contact@taxmxus.com** and ask us to stop using it for secondary purposes.
- Unsubscribe from newsletters with the link in each email.
- Reject or withdraw your consent to analytics cookies in the cookie banner or the "Cookie settings" link in the website footer.

6. How do you exercise your rights or withdraw your consent?

You have the right to **access**, **correct** or **delete** your personal data, or to **object** to its processing (known in Mexico as "ARCO rights"), and to **withdraw** any consent you gave us.

- **How:** email **contact@taxmxus.com**, or deliver a written request to the address in section 1. Requests are handled directly by the data controller.
- **Your request must include:** (i) your name and an address or email for our reply; (ii) a document proving your identity or, if applicable, your representative's identity and authority; (iii) a clear description of the data and the right you want to exercise (except for access requests); and (iv) any document that helps us locate your data. To correct data, tell us the change and attach supporting documents.
- **Timing:** we reply within **20 business days** of receiving your request. If it's granted, we carry it out within **15 business days** after our reply. Either period may be extended once for an equal period if the case justifies it.
- **Cost:** free. We may only charge the cost of copies or shipping.
- **Limits:** we can't delete or stop processing data the law requires us to keep, including data related to tax obligations, or data needed to perform our contract with you. Withdrawing consent isn't retroactive.

If you get no reply or disagree with it, you may file a data protection request with Mexico's **Secretaría Anticorrupción y Buen Gobierno** within 15 business days after our reply.

7. How long do we keep your data?

- **Prospective clients who don't hire us: 12 months** from our last contact (form messages, emails, appointments and WhatsApp conversations); then we delete it.
- **Clients:** for the duration of our relationship and then for **five years** from the filing of the last return related to that data, in Mexico or the United States. If the information has tax effects that continue over time (for example, losses carried forward or the cost basis of a property), the period runs from the return for the

last year in which those effects occur. When the period ends, we block the data and then delete it.

8. Do we use cookies or other tracking technologies?

Yes. When you visit our website, we show you a cookie banner.

- **Necessary cookie:** stores your cookie choice. It can't be turned off because the site needs it.
- **Analytics cookies (Google Analytics 4):** used only if you click **"Accept"**. They collect information about your visit (pages viewed, time on site, device and browser type, approximate location and a random identifier) so we can measure and improve the site. If you click **"Reject"**, they are not used.
- **Embedded booking page (Calendly):** Calendly may set its own cookies, so the booking page loads only when you click to see available times. See Calendly's privacy notice.
- **How to turn them off:** click "Reject", change your choice with the "Cookie settings" link in the footer, or delete cookies in your browser settings.

COOKIE	PROVIDER	PURPOSE	DURATION	TYPE
tx_consent	taxmxus	Stores your cookie choice	12 months	Necessary
_ga	Google Analytics	Distinguishes users	2 years	Analytics (only if you accept)
_ga_<id>	Google Analytics	Keeps session state	2 years	Analytics (only if you accept)

We set Google Analytics to its shortest user- and event-level data retention period (2 months) and turn off its advertising features.

9. How do we protect your data?

We use administrative, technical and physical safeguards: encryption, two-factor authentication, limited access and mandatory confidentiality for our whole team. **Never send us documents or ID numbers through our website form, regular email or WhatsApp:** after you sign the engagement letter, we give you access to our encrypted client portal. If a security breach significantly affects your financial or personal rights, we will tell you right away.

10. How will we tell you about changes to this notice?

We'll post any change on this page, with the last-updated date at the top. If the change is substantial (for example, a new purpose or a new data controller), we'll also email you if you're a client or have given us your email.

11. Applicable law and authority

This notice is issued under Mexico's **Federal Law on the Protection of Personal Data Held by Private Parties** (*Ley Federal de Protección de Datos Personales en Posesión de los Particulares*, published March 20, 2025; last amended November 14, 2025). The competent authority is Mexico's **Secretaría Anticorrupción y Buen Gobierno**.

For clients who are US individuals, we also provide our privacy notice under US federal law (Gramm-Leach-Bliley Act / Regulation P) with the engagement letter.