

# InHouse Privacy Policy

This describes Round Table Legal AI, Inc.'s (aka InHouse) approach to Privacy and provides information about how InHouse collects, uses, processes, and discloses personal information.

If you have questions about this Privacy Policy or would like to exercise any of your privacy rights, you can email us at [info@inhouse.so](mailto:info@inhouse.so).

## What This Privacy Policy Covers

This Privacy Policy describes how InHouse uses personal information in connection with goods and services sold by InHouse, our apps, and the use of the InHouse.so website unless otherwise listed below.

## InHouse's Approach to Privacy

InHouse takes your privacy seriously. In addition to this Privacy Policy, we have internal policies and practices designed to keep your personal information secure and to ensure that information about you is only used consistent with this Privacy Policy. InHouse AI collaborates with OpenAI APIs and may incorporate additional APIs in the future. OpenAI does not train models using your information, and data is retained for abuse and misuse monitoring purposes for a maximum of 30 days.

## The Personal Information We Collect

In this section of the Privacy Policy, we explain the types of personal information we may collect. The specific information that we may collect about you depends on the type of interaction and the types of products considered or purchased.

InHouse potentially collects the following categories of personal information:

**Identifiers:** Examples of the types of identifiers that InHouse may collect include real names, nicknames, signatures, postal addresses, online identifiers, Internet Protocol addresses, email addresses, and account numbers.

**Sensitive Information:** Examples of the types of sensitive information that InHouse may collect includes social security, driver's license, state identification card, and passport numbers, and usernames and passwords for accounts connected to InHouse.so.

**Biometric information:** With your consent, InHouse may work with Stripe to use technology to verify your identity by comparing a digital image of your face to the picture on the government identification you provide.

**Characteristics protected under some laws:** Examples of the types of characteristics that InHouse may collect include age, national origin, citizenship, marital status, medical information, sex, and veteran or military status. InHouse does not use this type of information to analyze your health, sex, gender identity, or sexual orientation.

**Commercial information:** Examples of the types of commercial information that InHouse may collect includes records of business and other property owned, products or services purchased, obtained, or considered from InHouse or our partners, and other purchasing or consuming histories or tendencies.

**Internet information:** Examples of the types of internet activity information that InHouse may collect includes browsing history, search history, information about the device used to access our website or applications, and information regarding your interaction with websites, applications, or advertisements. We may also collect information from visitors to our website, such as browser settings, operating systems, referring/exit pages, and clickstream data. When we send you an email, InHouse may also collect information, including about how you interact with that email.

**Geolocation information:** InHouse may collect information about where a consumer resides or is otherwise located.

**Audio and visual information:** InHouse may make audio recordings of telephone calls. We may make visual recordings if you agree that we may videotape or photograph you. We may also collect visual images of you in connection with legal requirements, security purposes, or when required for providing certain products.

**Professional and employment-related information:** Examples of the types of professional and employment-related information InHouse may collect includes information about professional status and affiliations, employment history, salary, and employment status.

**Other types of information:** Examples of other types of information include physical characteristics or descriptions of you, telephone number, insurance policy number, financial information including bank account, credit card, and debit card numbers, and health insurance information. It also includes additional information provided to InHouse directly by you, such as when you complete a questionnaire, upload a document, answer a survey, or receive a financial consultation. This category includes

information identified as personal information in California Civil Code Section 1798.80(e) that is not otherwise categorized above.

## **Where We Collect Personal Information**

In this section of the Privacy Policy, we explain where and how we collect personal information.

**Customers:** Much of the personal information that InHouse collects comes directly or indirectly from our customers and prospective customers. Information that is collected directly from you is information that you provide when you complete a form online, upload a document, use a chat feature, or speak to us on the phone. We may also collect information indirectly about you when you interact with our website, using cookies and other tracking technologies.

**Related Parties:** We may collect information about you from someone you know. For instance, if you are a shareholder in a business that is formed through InHouse, we may be given information about you by that business to complete the formation. We may also receive information about you from customers using our products to send communications to you, such as our e-signature product.

**Service Providers:** We may collect information about you from our Service Providers or other companies that we work with to deliver products to you. As used in this Privacy Policy, Service Providers means entities that InHouse has contracted with to provide us with services to help fulfill our business needs. An example of the type of information that we may receive from a Service Provider is information about whether any Legal Mail has been received as part of our Registered Agent services. Service Providers may also assist us in collecting information both directly and indirectly from you.

**Professionals (including attorneys):** We may receive information about you from the attorneys you work with through our product offerings. InHouse does not intend to collect any information from attorneys where the collection would result in a waiver of the attorney-client privilege.

**Business Partners:** We may receive information about you from our Business Partners. As used in this Privacy Policy, Business Partners means entities that InHouse has contracted with to engage in cross-promotional or product integration activities. An example of the type of information that we may receive from our business partners is information about the products you purchased from them.

**Affiliates and Subsidiaries:** We may receive information about you from our affiliates and subsidiaries. For example, if we acquire an ownership interest in a company, we may receive information about you as part of that acquisition if you have previously done business with them.

**Publicly/Commercially Available Information:** We may collect information about you from publicly available sources of information, including government records, social media sites, and other commercially available sources of personal information. Examples of the type of information we may collect from publicly available sources are whether your entity is in good standing with a Secretary of State or whether you have recently expressed interest in purchasing a product that InHouse sells.

**Unrelated Parties:** We may receive information related to you from people and entities with whom InHouse does not have a direct relationship. An example of the type of information that we may receive from unrelated third parties are documents that we receive on your behalf in our role as your Registered Agent.

## **How We Use the Personal Information We Collect**

In this section of the Privacy Policy, we explain our commercial and business purposes for collecting information. InHouse uses the information that it collects for the purposes listed below. We use technology, including automated processing and human review to accomplish these purposes. We may also combine information that we have collected from multiple sources.

If we decide to use the personal information we have collected for additional purposes that are inconsistent with what is described below, we will let you know of our plans and give you information about your legal rights regarding your personal information.

**Providing Products and Services:** We use personal information to provide and support our products and services. Examples of these uses include producing and delivering documents purchased by customers, administering the InHouse website, and displaying content based on customer preferences.

**Security:** We use personal information to ensure we maintain appropriate security over computer networks and our physical facilities, as well as detecting fraud or other suspicious activities.

**Marketing and Advertising:** We use personal information for marketing to current and prospective customers. More information about how you can control the use of your

personal information for marketing purposes can be found in the sections “InHouse’s Use of Cookies and Similar Technology, and Your Choices” and “Your Options Regarding Personal Information Collected by InHouse.”

**Product Development:** We use personal information for product development, including improving our existing offerings and developing new products and services, including machine learning or Artificial Intelligence ("AI") technologies.

**Analytics:** We use personal information for various types of analytics. For example, InHouse uses personal information to analyze how visitors arrive at and interact with our website, and to gain insight into the types of customers that may be interested in our products and services. We may also use the information to develop inferences from the information we collect regarding customer preferences, characteristics, predispositions, behaviors, and attitudes.

**Operational Purposes:** We use personal information for operational purposes, and the operational purposes of our service providers, business partners, affiliates, and subsidiaries. For instance, InHouse may use the information to maintain our website and other infrastructure, training, quality assurance, for conducting surveys or sweepstakes, to promote our brand, and to use in connection with our relationships with service providers and business partners.

**Financial Reporting:** We use personal information in connection with various types of financial reporting and other similar internal uses. Examples of the types of financial reporting that InHouse may use personal information includes internal budgets and projections, compensation calculations, and public reporting.

**Meeting Legal Requirements:** We use personal information to meet our legal obligations, such as performing customer due diligence, maintaining records as required in our role as a Registered Agent, or responding to subpoenas for information.

**Business Transfers:** If InHouse undertakes or is involved in any merger, acquisition, reorganization, sale of assets, bankruptcy, or insolvency event, then we may sell, transfer, or share some or all of our assets, including information related to customers in connection with the transaction or in contemplation of the transaction (such as conducting due diligence). If such an event occurs, your information may be treated like any other InHouse asset and sold, transferred, or shared with third parties, or used in ways not contemplated or permitted under this Privacy Policy. In this case, you will be notified via email and/or a prominent notice on our site of any change in ownership or

uses of your personal information, as well as any choices you may have regarding your personal information.

## How We Disclose Personal Information

In this section of the Privacy Policy, we explain to whom we disclose personal information and under what circumstances we may make a disclosure.

**Service Providers:** We may share personal information with our service providers who assist us with running our business. These companies are not authorized to use the information we share with them for any purpose other than providing services to InHouse or to you.

**Businesses Providing Services:** InHouse may disclose personal information with other businesses to provide you with products and services. Personal information disclosed to other businesses will be subject to those third parties' privacy practices. For instance, we may use [FedEx](#), the [United States Postal Service](#), or other shipping providers to deliver physical products you have purchased. Similarly, we may use [WorldPay](#), [Adyen](#), or [Stripe](#) for purposes of processing payments or providing identity verification services. In doing so, these processors may collect and process personal information for its uses, including improving its services and for fraud detection and prevention.

**Professionals (including attorneys):** We may share personal information with network attorneys.

**Business Partners:** InHouse may share personal information with business partners. When we share personal information with business partners, it will generally be subject to their privacy policy. We share information with business partners in the following circumstances:

- If you express interest in an offer presented to you either by InHouse on behalf of a business partner or by a business partner on behalf of InHouse, you are directing InHouse to provide information about you to that business partner.
- If you purchase a InHouse product that is bundled with a product offered by one of our business partners, we will share information about you with that business partner.

**Parties Related to You:** We may provide information about you to someone you know or that you have connected with through our platform. For instance, we may provide

information connected to your InHouse account with your authorized contacts. We may provide information about you to a customer requesting that you sign a document, such as whether you have completed the signature process.

**Government Entities:** InHouse may share information about customers with government entities to fulfill the products purchased by our customers. Certain personal information becomes public record when documents are filed with the federal or a state government, or with a court. For example, a corporation's name, business address, and registered agent name becomes public information when its articles of incorporation are filed. A Secretary of State may publish this information to its website or provide this information to third parties. The U.S. Patent and Trademark Office publishes the names and addresses of trademark registrants. This Privacy Policy does not cover these or similar third-party actions.

**Public Disclosures:** InHouse may publicly disclose personal information in limited circumstances.

- We may share information publicly when it is necessary to fulfill a product that has been purchased by a customer. For example, in some states, fictitious business names, including the name and address of the business owner, must be published in a newspaper.
- We may display testimonials and reviews received through email surveys on our website or other marketing or that are posted to publicly available websites.
- When you post content in any forum or comment area on our website, these posts may be publicly available. You should use caution when deciding whether to disclose your personal information in public areas of our website.
- When we collect publicly available information, we may share that information on our website.

**Registered Agent Requests:** If you designate a person or company other than InHouse to serve as the registered agent for your business entity, InHouse may provide your name and contact information to that party, if the designee requests.

**Required by Law:** InHouse may disclose personal information as required by law, such as in response to a subpoena or a lawful request by a public authority, including to meet national security or law enforcement requirements, or similar legal processes. We may also disclose personal information when we believe in good faith that disclosure is necessary to protect our rights, protect your safety or the safety of others, investigate fraud, or respond to a legitimate request from a government entity.

Parties Related to InHouse: InHouse may disclose personal information with businesses controlling, controlled by, or under common control with InHouse. If InHouse is merged, acquired, or sold, or if some or all of our assets or equity are transferred, we may disclose or transfer consumer data in connection with the associated transactions.

## **How Long We Retain Your Personal Information**

InHouse retains your personal information for at least as long as it is necessary to fulfill the purposes for which we collected the data, to provide you with services and products, to comply with our data retention obligations, and to successfully run our business.

## **InHouse's Approach to Privilege**

In order to protect the privilege of communications between you and your lawyer, we do not share those chats with any outside party including LLM providers like OpenAI. InHouse AI is turned off when the lawyer enters the conversation to prevent that information from passing to third parties. Before the attorney enters the conversation however, your communications with the AI are not privileged and its work-product is not considered attorney-work product since the AI is not a lawyer.

To maintain strict confidentiality, we employ enterprise-grade security measures and require all employees and contractors to sign NDAs preventing their use or disclosure of any personal or client information.

## **InHouse's Use of Cookies and Similar Technology, and Your Choices**

Like all online companies, InHouse uses a range of technologies in connection with your use of our website, mobile application, and when you engage with emails that we send you. The types of technologies that we may use include cookies, web beacons, tags, scripts, local shared objects such as HTML5, advertising identifiers (including mobile identifiers such as Apple's Identifier for Advertisers ("IDFA") or Google's Advertising ID ("GAID")), and similar technologies, which for purposes of this Privacy Policy we refer to as "Cookies."

We use Cookies, either directly or through our service providers, for a variety of purposes. Depending on the purpose, you have different options regarding whether and how we use Cookies to collect your personal information.



- **Strictly Necessary Cookies:** We use Cookies to help our website operate and for security purposes. Due to the nature of these Cookies, you do not have the ability to opt-out of the use of these Cookies.
- **Performance and Functionality Cookies:** We use Cookies to provide enhanced functionality on our website and app, to personalize your experience, to collect information for analytical purposes to help us improve and develop products, and to help us understand how you are engaging with our products. If you reject these Cookies, the functionality of our website may be impacted, including in ways that may limit your use of our products and services.
- **Engagement and Marketing Cookies:** InHouse and our service providers, such as Google Analytics, use Cookies to help us understand how you engage with our marketing and to help provide you with relevant marketing about our products when you visit other websites, including through targeted advertising. If you do not wish for InHouse to use Engagement or Marketing Cookies when you visit our website, you may opt-out through our Preference Center, or through the link at the bottom of our homepage called “Your privacy choices.” Our websites also recognize browsers’ Global Privacy Control signals and will suppress the use of Engagement and Marketing Cookies when these signals are present.

In addition to the tools provided by InHouse, you may also use tools provided by the [Networking Advertising Initiative](#), the [Digital Advertising Alliance](#), and [Google Analytics’ Ad Settings](#) to control how these types of Cookies are used when you are on the internet, even when you are not on InHouse’s website.

## **Your Options Regarding Personal Information Collected by InHouse**

This section describes how you can access and control the information that InHouse may have about you. It applies to all consumers worldwide, including individuals who have purchased goods or services from InHouse or who believe that information about them may have been provided to us by a third party. Depending on where you reside, you may have additional rights beyond what is described in this section. If you are a resident of California, Colorado, Connecticut, Virginia, the European Union, or the United Kingdom, please review the sections “Information for California, Colorado, Connecticut, and Virginia Residents” or “Information for EU and UK Customers and Visitors” for more information about your rights.

**Confirmation of Possession of Information Related to You.** Upon a verified request, subject to the privacy interests of others and technical limitations, InHouse will provide you with information about whether we hold any information related to you. At

InHouse's sole discretion, unless otherwise required by law, we may, in some instances, correct or delete information upon a verified request. Please note, however, that in certain circumstances, we may be required by law to retain your personal information or may need to retain your personal information to continue providing a product or service to you or another customer.

If you would like to submit a request about your data, you may do so by emailing us at [info@inhouse.so](mailto:info@inhouse.so). After you submit the request, you will be asked to verify your email address and may also be asked to provide additional information to verify your identity.

**User and Authorized Contact Access to Order Information.** InHouse will give you, or anyone listed as an authorized contact for your account, information about your order. This may include information about the nature and status of your order, the information you provided to process your order, payment information, and contact information. If you want someone to have access to your order, you must list them as an authorized contact, or they may not obtain such information. You can confirm who is listed as an authorized contact for your account, add new authorized contacts, or remove authorized contacts by clicking first on "My Account", and then on "Account Information." We may send a confirmation email to your authorized contact(s) alerting them that they have been added as an authorized contact. For some products, we may provide information about your order to other individuals named in the order, such as executors named in a last will or additional named individuals in a trademark application. For product-specific information about who may request information about your order, please contact Customer Care at [customer care@InHouse.so](mailto:customer care@InHouse.so) or (800) 773-0888.

**User Access to and Ability to Update Personal Information through MyAccount.** You may visit your personal account profile at any time by clicking on the "My Account" link. Through My Account, you may: (i) review and update basic information about yourself, (ii) complete pending orders, and (iii) begin new orders.

**Opting Out of Promotional Email.** You can opt-out of promotional emails by using the "Unsubscribe" link and following the unsubscribe instructions in an email you receive from us or by emailing us at [info@InHouse.so](mailto:info@InHouse.so). We may also send service-related or transactional communications, which are not promotional. Generally, you may not opt-out of these communications. If you do not wish to receive service-related communications, you may terminate your account by contacting us.

**Opting Out of Marketing Calls.** If you wish to be placed on InHouse's internal "Do Not Call" list, you can tell us either while speaking to us on the phone or by emailing us at [info@InHouse.so](mailto:info@InHouse.so).

Opting Out of SMS/Text Messages. If you wish to stop receiving SMS or text messages from InHouse, you can reply STOP to any SMS/text that you receive from us.

## **InHouse's Security and Identity Verification Practices**

InHouse is committed to protecting the personal information that we collect and ensuring our products and services are provided in a secure manner. We have implemented security measures designed to protect the personal information that we maintain. This includes implementing physical, technical, and administrative safeguards to secure the information we collect. We use industry-standard SSL/TLS to transmit payment card information. We also regularly monitor our systems for possible vulnerabilities and attacks.

Regardless of the measures and efforts that InHouse takes to protect personal information, we cannot guarantee absolute protection and security of your personal information. For instance, when we transmit documents to you via mail delivery services or electronically, there remains the possibility that this information may be misdirected, misdelivered, or intercepted.

We encourage you to take precautions in protecting the information that you share with InHouse. For example, we encourage you to set strong passwords on your account and avoid sharing your password with anyone. Where available, we encourage, and may at times require, you to utilize multi-factor authentication to further ensure access to your account is restricted.

If you believe that you have discovered a security vulnerability in our website or services, you may let us know by email. If you believe that someone has accessed your personal information or that your personal information has been misused, please let us know immediately by submitting your concerns by email.

## **Information for California, Colorado, Connecticut, and Virginia Residents.**

If you are a resident of California, Colorado, Connecticut, or Virginia, this section provides information regarding your rights, and InHouse's responsibilities, regarding your personal information.

Your Rights

If you live in California, Colorado, Connecticut, or Virginia, you have certain rights regarding your personal information. This includes the right to request:

- Specific information about what information InHouse has collected about you,
- A copy of your personal information,
- Corrections to inaccuracies in the personal information InHouse maintains about you, and
- The deletion of your personal information.

These rights are not absolute, and in some circumstances, InHouse may decline to satisfy your request. For example, if we are unable to verify your identity or if your request impacts other people's privacy rights, we may deny your request to exercise these rights. We may also deny your request when InHouse has the legal right to do so, such as when we have an ongoing business relationship with you, an ongoing need to use the information for purposes outlined in this Privacy Policy, or we are legally required to retain your personal information. If InHouse denies your request to exercise your privacy rights, we will tell you why we are denying the request and provide you with information about how to appeal this decision.

If you choose to exercise your privacy rights, we will not charge you different prices or provide a different quality of services unless those differences are related to your personal information.

#### How to Submit a Request for Access, Correction, or Deletion of Personal Information

If you would like to submit a request about your personal information, we encourage you to do so by emailing us.

After you submit the request, you will be asked to verify your email address and may also be asked to provide additional information to verify your identity. InHouse will attempt to verify your identity by asking for information that correlates with the information that we have previously collected about you. If this is not possible, InHouse may request you submit additional information for verification, such as proof of residency or redacted government-issued identification.

You may also designate an authorized agent to make a request on your behalf. To designate an authorized agent, you must provide InHouse with written permission for the agent to make the request on your behalf or provide us with an executed power of attorney. You will also be required to submit both your and the authorized agent's valid government-issued identification.

## How to Appeal a Denial of a Request for Access, Correction, or Deletion of Personal Information

If InHouse denies your request about your personal information, you may submit an appeal of the decision. After you submit the request, you will be asked to verify your email address.

Once an appeal is submitted and your email is verified, the request and InHouse's response will be reviewed. In connection with this review, InHouse may request that you submit additional information regarding your request. We will notify you of the outcome of the appeal within 60 days.

## Selling, Sharing, and Use of Personal Information for Targeted Advertising

InHouse does not currently sell personal information to third parties. If in the future InHouse does decide to sell personal information, any personal information collected prior to our update of this Privacy Policy will be excluded from such sale unless you otherwise consent to that additional use of the data.

InHouse does engage in online marketing activities, including activities that may involve us sharing your information for purposes of showing you targeted advertising. If you would like to opt-out of the use of your personal information for these purposes, you can submit this request through the link at the bottom of our homepage called "Your privacy choices."

## **Changes To This Policy.**

We may update this privacy policy to reflect changes to our practices. We encourage you to review this page periodically for the latest information on our privacy practices.

If you have any questions regarding our Privacy Policy, please contact us by emailing us.

Updated: July 19, 2024