

Personal Information
Category

How it is Collected

How it is Used

How it is Not Used

Any Attachments
Attached to an Email
Communication or
Other User Support
Communication

You have actively
provided this
information to Upper
Partners through the
Upper Partners Site
and Services.

Upper Partners will
use this information to
facilitate your use of
the Site and Services
and to directly
respond to your
requests through its
Site or Services.

Upper Partners does
not sell information to
third parties. Upper
Partners may share
information it is
provided with third
parties or vendors to
respond to request or
provide further
services.

User Support
Communications

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Email Communications

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Entity State Tax Returns

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Personal State Tax
Returns

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Corporate State Tax Returns

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Form 1120

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Form 1120S

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Entity State Tax Document(s)

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Personal State Tax Document(s)

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State Tax Document(s)

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Form 1040 (includes full names, social security numbers, physical addresses, and other personal information of the filer, spouse, and/or dependent)

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1065 Federal Tax Document(s)

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PPP Loan Application Information

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Payroll Ledgers (Multi-Month, Multi-Year)

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Profit and Loss
Statement

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IRS Form 941
(includes first name, last name, signature, and phone number')

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W-2 Form

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SWIFT Number
(International)

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Bank Routing Number

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How it is Used

How it is Not Used

Bank Account
Number

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Bank Physical
Address

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Bank Name

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Company Employment
Identification Number
(EIN) (Tax Information
in other jurisdictions or
any type of federal
identification, such as
an ITIN)

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Company Website URL

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Company Email
Address

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Company Phone
Number

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Company Address

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Company Name or
DBA

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Content of Any
Message sent to Upper
Partners from the
Upper Partners Site

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Transaction History

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Browsing History

When you use the Upper Partners website, it will save your browsing history automatically.

Upper Partners will use this information to enhance your Site experience.

Upper Partners does not sell information to third parties. Upper Partners may share information it is provided with third parties or vendors to respond to request or provide further services.

IP Address

When you use the Upper Partners website, it will collect your IP address automatically.

Upper Partners will use this information to enhance your Site experience.

Upper Partners does not sell information to third parties. Upper Partners may share information it is provided with third parties or vendors to respond to request or provide further services.

Social Security Number

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Physical Address

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Email Address

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Phone Number

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Last Name

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First name

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