

Deihm Professional Services, LLC

PRIVACY POLICY

Version 1.2

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Document Control

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Revision History

Version	Date	Description of Changes	Author/Approver
1.0	May 29, 2026	Initial release of Privacy Policy	Tara Deihm
1.1	July 28, 2026	Expanded Privacy Policy to add Process Serving & Legal Support Services privacy provisions, including data collection, use, disclosure, retention, and third-party processing requirements. Updated cross-references to DPS-PRI-002 Data Security & Record Retention Policy.	Tara Deihm
1.2	August 3, 2026	edits were drafted to align with Microsoft’s campaign guidance, which says the SMS Privacy Policy must include a mobile opt-in data non-sharing statement	Tara Deihm
1.3	_____	_____	_____

Document Control Statement

Controlled Document

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Overview

Deihm Professional Services, LLC ("Company," "we," "our," or "us") is committed to protecting the privacy, confidentiality, and security of personal information collected through our website and in connection with our services. For purposes of this Privacy Policy, "Client" refers to any individual or entity that accesses the Company's website or engages its services.

This Privacy Policy explains how we collect, use, disclose, and safeguard information obtained through:

- our website;
- online scheduling and appointment booking tools;
- communications submitted through our website, email, or contact forms;
- remote online notarization ("RON") services; and
- and consulting, training, and advisory services.

This Privacy Policy applies to services provided under:

- Deihm Notary Services (including in-person notarization, loan signing services, Remote Online Notarization (RON), and process serving/legal support services); and
- Deihm Consulting Services (including master data management, impact data services, NMTC compliance consulting, training, advisory services, and related compliance support services).

Use of our website and services is also governed by our Terms and Conditions, which establish the contractual terms applicable to service engagements.

How We Collect Information

The Company collects information in several ways, including:

- Directly from you, such as when you complete a contact form, schedule an appointment, request services, upload documents, or communicate with us by email or other channels;
- Automatically through our website, such as through browser, device, and usage data;
- Through service platforms, including appointment scheduling systems, remote online notarization platforms, communication tools, or document-sharing tools used in connection with our services; and
- From authorized third parties, when information is provided on your behalf in connection with a requested service or engagement.

Information We Collect

The Company collects information necessary to operate our website, respond to inquiries, schedule and deliver services, maintain required records, and comply with applicable legal and regulatory obligations.

May include:

A. Personal Information

- Name, address, email address, and phone number;
- Government-issued identification details (as required for notarization); and
- Signatures and notarial records.

B. Transaction and Service Information

- Appointment details and scheduling records;
- Service history and engagement details; and
- Communications related to services.

C. Process Serving and Legal Support Information

- Case or matter reference information;
- Names and contact information of requesting parties;
- Service addresses and alternative locations;
- Information relating to recipients or parties to be served;
- Service instructions and deadlines;
- Service attempt records;
- Location and delivery confirmation information;
- Affidavits, declarations, proofs of service, and related supporting documentation;
- Communications relating to service attempts or case status; and
- Photographs or observations collected during service attempts where legally permitted.

D. Consulting-Related Information

- Business and operational data provided by Clients;
- Financial or compliance-related documentation; and
- Internal reports, policies, or procedures shared for advisory purposes.

E. Technical and Usage Data

- IP address, device type, browser information;
- Website usage data;

- Pages visited, referral source, and date/time of website access; and
 - General interaction data related to website forms and scheduling tools.
- Scheduling platform interaction data.

F. SMS Communications and Mobile Opt-In Information

- Limited message delivery and interaction records necessary to manage SMS communications.
- SMS communication preferences, including HELP, STOP, START, or similar keyword responses; and
- SMS consent status, opt-in source, and related consent records;
- Mobile phone number provided for service communications;

Process Serving and Legal Support Privacy Notice

When process serving or legal support services are requested, the Company may receive information concerning individuals who are not direct clients of the Company. Such information is collected solely for the purpose of carrying out requested service activities, maintaining accurate service records, complying with legal obligations, documenting service attempts, preparing proofs or affidavits of service, and supporting lawful business operations.

The Company does not use such information for marketing purposes and limits disclosure to those circumstances necessary to perform the requested service, comply with legal obligations, protect its rights, or support judicial or administrative proceedings.

Cookies and Website Technologies

The Company's website and connected service tools may use cookies or similar technologies to:

- Support site functionality;
- Improve user experience;
- Analyze traffic; and
- Help manage scheduling or service interactions.

These technologies may collect information such as browser type, device information, pages visited, and general usage activity. You may be able to control certain cookie settings through your browser; however, disabling some technologies may affect website functionality.

How We Use Your Information

The Company uses personal information and related data only as reasonably necessary to operate our website, respond to inquiries, deliver requested services, maintain appropriate business and notarial records, protect the security and integrity of our operations, and comply with applicable legal, regulatory, and professional obligations.

We use collected information to:

- Provide and deliver notary and consulting services;
- Verify identity and comply with legal notary requirements;
- Perform process serving, legal support, service attempt documentation, affidavit preparation, delivery confirmation, and related administrative support services;
- Verify service instructions, scheduling requirements, service locations, and completion status;
- Maintain records necessary to document service activities and respond to client, court, regulatory, or legal inquiries.
- Schedule and manage appointments;
- Communicate with you regarding services;
- Maintain required records and documentation;
- Improve service quality and Client experience;
- Respond to inquiries submitted through our website or contact channels;
- Operate, maintain, and improve website functionality; and
- Monitor website usage and support security, fraud prevention, and service integrity.

The Company relies on the accuracy and completeness of Client-provided information for service delivery.

SMS Communications and Mobile Opt-In Data

Message frequency varies based on the services requested and the nature of the client interaction.

Message and data rates may apply. Individuals may reply STOP to unsubscribe from SMS communications or HELP for assistance.

Text messaging originator opt-in data and consent will not be shared with any third parties for marketing or promotional purposes. This SMS-specific restriction applies regardless of any general information-sharing language elsewhere in this Privacy Policy.

Mobile opt-in information, including mobile phone numbers and SMS consent records, will not be sold, rented, shared, or disclosed to third parties or affiliates for marketing or promotional purposes.

If you provide a mobile phone number and consent to receive text messages from Deihm Professional Services, LLC, the Company may send SMS communications related to requested services, appointment scheduling, appointment confirmations, appointment reminders, Remote Online Notarization (RON) sessions, loan signing coordination, process serving updates, consulting engagements, customer support, and other service-related communications.

Disclosure of Information

The Company does not sell personal information. We also do not share personal information for targeted advertising purposes.

We may disclose information only as necessary to facilitate service delivery in the following circumstances:

A. Service Providers and Platforms

- Scheduling and booking platforms (e.g., Microsoft Bookings);
- Remote notarization platforms (e.g., SiGNiX or equivalent providers);
- Online Customer relationship management services (e.g., Salesforce or equivalent providers);
- Communication platforms (e.g., Microsoft Outlook, Teams);
- Document management providers (e.g., Microsoft OneDrive, SharePoint);
- Payment and point of sale platforms (e.g., QuickBooks); and
- Website hosting and security providers as required by law.

B. Legal and Regulatory Requirements

- When required by law, regulation, subpoena, or court order; and
- To comply with notarial recordkeeping and reporting requirements.

C. Professional Obligations

- To protect the rights, safety, and integrity of the Company and its clients; and
- To prevent fraud, unauthorized transactions, or misuse of services.

D. Courts, Legal Proceedings, and Service Activities

Information may be disclosed when reasonably necessary:

- To effectuate service of legal documents;
- To prepare or provide affidavits, declarations, proofs of service, or similar records;
- To comply with court orders or procedural requirements;
- To respond to legal disputes concerning service activities; or
- To support lawful requests from attorneys, courts, governmental agencies, or authorized parties.

Data Storage & Retention

The Company retains information only as long as necessary to:

- Fulfill the purposes outlined in this policy; and
- Comply with legal, regulatory, and notarial recordkeeping requirements.

Notarial records are subject to statutory retention requirements under Pennsylvania law.

For remote online notarization (RON) transactions, audio-visual recordings of the notarial act and related electronic records are retained for a minimum of ten (10) years, as required by applicable law.

Notarial journals and associated records are maintained in accordance with Pennsylvania recordkeeping requirements and may be retained for similar periods where required for legal, regulatory, or evidentiary purposes.

Process serving and legal support records, including service requests, service attempt logs, affidavits, proofs of service, correspondence, scheduling records, delivery confirmations, and related documentation, may be retained for as long as reasonably necessary to support business operations, dispute resolution, legal compliance, evidentiary requirements, insurance needs, or contractual obligations.

Consulting-related data, website inquiry submissions, and service communications are retained for as long as reasonably necessary for business operations, Client service, recordkeeping, dispute resolution, security, and legal or regulatory compliance, unless a longer retention period is required or permitted by law.

Data Security

The Company implements appropriate administrative, technical, and physical safeguards to protect your information. Access to sensitive information is limited to what is reasonably necessary to operate the business, provide requested services, maintain records, and support legal or operational requirements.

These measures include, but are not limited to:

- Use of secure platforms for document handling and Remote Online Notarization, including providers with built-in encryption, identity verification, and audit capabilities;
- Secure network practices, including the use of encrypted connections and virtual private network (VPN) protections where appropriate;
- Endpoint and system security measures, including antivirus, threat detection, and system monitoring tools; and
- Controlled access to sensitive information and secure communication methods.

While we take reasonable steps to protect your information, no system or transmission method can be guaranteed to be completely secure.

Your Privacy Rights & Choices

Depending on applicable law, Clients may have the right to:

- Request access to personal data;
- Request corrections to inaccurate information; and
- Request deletion, where permitted by law.

Certain information, including notarial records, Remote Online Notarization records, process serving records, affidavits, proofs of service, litigation-related documentation, and records subject to legal retention requirements, may not be eligible for deletion.

To submit a privacy-related request, please contact the Company using the information listed in the Contact Information section below. We may need to verify your identity before responding to certain requests. Some requests may be limited where information must be retained to comply with legal, regulatory, security, or recordkeeping obligations.

Children's Privacy

The Company's website and services are not directed at individuals under the age of eighteen (18), and we do not knowingly collect personal information directly from minors through our website or services.

Limitation of Responsibility

While the Company uses reasonable safeguards to protect information, no method of electronic transmission, storage, or processing can be guaranteed to be fully secure. Use of our website and services is at your own risk to the extent permitted by applicable law. Additional limitations of liability applicable to services are set forth in the Company's Terms and Conditions.

Third-Party Links and External Sites

The Company's website may contain links to third-party websites, platforms, or tools that are not operated by us. We are not responsible for the privacy practices, content, or security of those external sites. Users should review the privacy policies of any third-party websites they access.

Third-Party Services

The Company may utilize third-party service providers and technology tools to operate our website, manage scheduling, facilitate communications, store documents, support security, and deliver notary or consulting services.

These platforms may collect, store, and process data in accordance with their own privacy policies.

Examples include:

- Appointment scheduling systems;
- Remote notarization providers;
- Process serving and case management platforms;
- Mapping and route optimization tools;
- Mailing, courier, and delivery service providers;
- Court filing, e-filing, or litigation support platforms where applicable;
- Identity verification and address verification services;
- Point of sale services; and
- Communication and document management tools.

Where third-party providers process information under their own privacy practices, their policies may also apply.

Changes to This Policy

The Company may update this Privacy Policy from time to time to reflect changes in our practices, technology, legal requirements, or business operations. Any updated version will be posted on our website and reflected by a revised *Last Updated* date.

Contact Information

Contact us if you have questions about this Privacy Policy or your information:

Deihm Professional Services, LLC

 contact@deihmpro.com

 www.deihmpro.com