

Terms of Use

Effective Date: March 16, 2021

This Terms of Use (together, this “**Agreement**”) describe the terms and conditions on which Sweeney Conrad, P.S., a Washington professional service corporation, with offices at 10210 NE Points Dr., Suite 300, Kirkland, WA 98033 (“**Sweeney Conrad**,” “**we**,” “**us**” or “**our**”) offers you access to www.sweeneyconrad.com or any related website or service in or to which this Agreement is linked or referenced (collectively, the “**Services**”). To download a copy of these Terms of Use please click [here](#).

Before accessing and using the Services, please read this Agreement carefully because it is a legal agreement between Sweeney Conrad and you.

BY ACCESSING AND USING THE SERVICES, YOU AFFIRM THAT:

- YOU HAVE READ AND UNDERSTAND THIS AGREEMENT;
- YOU WILL COMPLY WITH THIS AGREEMENT; AND
- YOU ARE AT LEAST THE AGE OF LEGAL MAJORITY IN YOUR PLACE OF RESIDENCE AND OTHERWISE LEGALLY COMPETENT TO ENTER INTO A LEGAL AGREEMENT.

IMPORTANT NOTE

Please read carefully the Sections titled “DISCLAIMER OF WARRANTIES,” “LIMITATIONS OF LIABILITY” and “DISPUTE RESOLUTION”. These provisions limit Sweeney Conrad’s liability to you and affect how disputes are resolved.

If you do not agree to any term of this Agreement, please do not use the Services. For more information regarding how we collect and process personal information, please review our [Privacy Policy](#).

CHANGES TO TERMS

The Effective Date of this Agreement is set forth at the top of this webpage. As we add new features, we may revise or supplement this Agreement. We will provide you with advance notice of material revisions to this Agreement. We will not make revisions that have a retroactive effect unless we are legally required to do so or to protect other users of the Services. Your continued use of the Services after the Effective Date constitutes your acceptance of this Agreement, as amended. As of the Effective Date, the amended Agreement supersedes all previous versions of, or agreements, notices or statements about, this Agreement.

ADDITIONAL TERMS

Certain Sweeney Conrad Services, such as sweeneyconrad.sharefile.com, and features thereof may be subject to additional or separate terms (“**Additional Terms**”) presented in conjunction with them. Regardless of how they are presented to you, you must agree to Additional Terms before using the features of the Services to which they apply. Unless otherwise specified in Additional Terms, all Additional Terms are incorporated into this Agreement. If you do not agree to Additional Terms, then you may not use the Services to which they relate. This Agreement and Additional Terms apply equally but, if any Additional Term is inconsistent with any provision of this Agreement, the Additional Term will prevail for the Services to which the Additional Terms apply.

SWEENEY CONRAD CONTENT

Sweeney Conrad and its licensors retain full and complete title to all information and materials provided on or through or submitted to the Services, including any artwork, graphics, text, video and audio clips,

trademarks, logos and other content (collectively, “**Sweeney Conrad Content**”). All other trademarks not owned by Sweeney Conrad that appear in the Services are the property of their respective owners.

If you agree to this Agreement (as well as any Additional Terms), then you may download, print and/or copy Sweeney Conrad Content solely for your own personal use.

Except for content that is in the public domain or unless Sweeney Conrad provides you with written authorization to do so, you may not:

- Incorporate any Sweeney Conrad Content into any other work (such as your own website) or use Sweeney Conrad Content in any public or commercial manner;
- Copy, modify, reproduce, adapt, reverse engineer, distribute, frame, republish, upload, display, post, transmit, transfer, license or sell Sweeney Conrad Content in any form or by any means;
- Change any of the notices about copyright, trademarks or other intellectual property rights that may be part of the Sweeney Conrad Content; or
- ‘Deep link’ to any of the Services (i.e., link to any page other than the home page of one of the Services).

EXCEPT FOR SWEENEY CONRAD CONTENT PROVIDED BY US OR OUR AGENTS, WE DO NOT GUARANTEE THE ACCURACY, COMPLETENESS OR USEFULNESS OF ANY INFORMATION ON THE SERVICE OR ENDORSE THE ACCURACY OR RELIABILITY OF ANY OPINION, ADVICE, OR STATEMENT MADE BY ANY THIRD PARTY. SWEENEY CONRAD IS AN INDEPENDENT, NONPARTISAN ORGANIZATION. SWEENEY CONRAD TAKES NO INSTITUTIONAL POSITIONS ON POLICY ISSUES. REFERENCES TO SPECIFIC NONPROFIT, PRIVATE, OR GOVERNMENT ENTITIES ARE NOT AN ENDORSEMENT.

USING THE SERVICES

Age of Eligibility: You must be the age of legal majority or older in your place of residence to use the Services.

Your Account: You are required to create an account to use certain features of the Services (your “**Account**”). This Account will be used to fulfil our business relationship with you, including managing investment transactions and providing tax assistance.

You agree that you will maintain your Account information to ensure that it is always current, complete and accurate. If you provide untrue, incomplete, misleading or inaccurate information, you understand that we have the right to terminate your Account and use of the Services.

You agree to protect the security of your Account. You are responsible for all use of your Account, including your login credentials (i.e., username and password) and activation codes and passwords. Sweeney Conrad treats access to the Services through your account credentials as authorized by you. Any access or activity by an authorized business user account will be treated as authorized by the associated registered linked business account. Unauthorized access to password-protected or secure areas is prohibited and may lead to criminal prosecution. Sweeney Conrad may suspend your use of all or part of the Services without notice if we suspect or detect any breach of security. Please immediately notify Sweeney Conrad using the contact information provided below if you believe that information you provided to us is no longer secure or if you need to deactivate your account or password.

Accessing the Services: You are responsible for the software, hardware and Internet service needed to access and use the Services. If you access and use the Services on your smartphone, tablet or other mobile device (“**Mobile Device**”), you are solely responsible for any and all data and other fees related to use of the Services through your Mobile Device.

Certain Services may offer text messaging (SMS or MMS) services. Message and data rates may apply. Once you opt-in to receive text messages from us, the frequency of text messages that we send to you

depends on your transactions with us. All charges are billed by and payable to your wireless service provider. Please contact your wireless service provider for pricing plans and details. Text message services are provided on an "as is" basis and may not be available in all areas at all times.

BY AGREEING TO RECEIVE TEXT MESSAGES, YOU UNDERSTAND AND AGREE THAT SWEENEY CONRAD MAY USE AN AUTOMATIC DIALING SYSTEM TO DELIVER TEXT MESSAGES TO YOU AND THAT YOUR CONSENT TO RECEIVE TEXT MESSAGES IS NOT REQUIRED AS A CONDITION OF PURCHASE FOR ANY SERVICES.

We do not guarantee availability of the Services at all times of the day. Sweeney Conrad may from time to time perform upgrades, updates or otherwise make the Services unavailable. To the maximum extent authorized under applicable law, we reserve the right to change, remove, delete, restrict, block access to, or stop providing any or all of the Services at any time and without notice. Except as provided in our customer agreements, Sweeney Conrad has no obligation to provide access to or support for the Services.

Restrictions on Your Use of Services: You may use the Services for lawful, non-commercial purposes only.

You agree that you will not (and you agree not to encourage or allow any third party to):

- Breach, test, circumvent (or attempt to breach, test or circumvent) any security, copy protection or rights management feature in the Services or otherwise attempt to gain unauthorized access to the Services, other users' Accounts, or Sweeney Conrad's computer systems or networks,
- Copy, modify, translate, adapt or otherwise create derivative works or improvements (whether or not patentable) of any part of the Services;
- Decompile, reverse engineer, disassemble or decode the Services or otherwise attempt to derive or gain access to the source code of any part of the Services (unless applicable laws specifically prohibit such restriction);
- Remove, alter or obscure any copyright, trademark or other intellectual property or proprietary notices contained in the Services;
- Use any robot, spider, site search/retrieval application, or other automated device, process or means to access, retrieve, scrape or index any portion of the Services;
- Use the Services to advertise, buy or sell any services;
- Distribute, rent, sublicense, lease, lend, sell, resell, assign, transfer, transmit, stream, broadcast or otherwise make available or exploit any features or functionality of the Services including though time-sharing, use of service bureau or by otherwise making the Services available on a network on which it is accessible by more than one device at any time;
- Reformat or frame any portion of the web pages that are part of the Services without Sweeney Conrad's written consent;
- Cause or launch any programs or scripts for the purpose of scraping, indexing, surveying, or otherwise data mining any portion of the Services or unduly burdening or hindering the operation and/or functionality of any aspect of the Services;
- Create an Account under fraudulent pretenses; or
- Collect or store Personal Data (as defined in the [Privacy Policy](#)) about any other user without his or her express prior written consent.

SUBMISSIONS

Sweeney Conrad may from time to time offer areas in the Services where you and other users can share files, including tax, investment, and other financial information (collectively, "**Submissions**"). You are the owner of and are responsible for your Submissions.

By submitting a Submission, you represent and warrant that:

- Your Submission is true and accurate;
- You own or otherwise control all of the rights to your Submission, including copyrights and trademarks, necessary to meet your obligations to Sweeney Conrad under this Agreement; and

- Your Submission does not violate the privacy, publicity, intellectual property or other rights of any other person or entity.

SWEENEY CONRAD TAKES NO RESPONSIBILITY AND ASSUMES NO LIABILITY FOR ANY SUBMISSION, INCLUDING LOSS OR DAMAGE RESULTING FROM YOUR RELIANCE ON INFORMATION OR OTHER CONTENT IN SUBMISSIONS. UNDER NO CIRCUMSTANCES ARE YOU ENTITLED TO PAYMENT FOR YOUR SUBMISSIONS. ALL SUBMISSIONS ARE DEEMED NON-CONFIDENTIAL AND NON-PROPRIETARY.

DISCLAIMER OF WARRANTIES

Sweeney Conrad warrants that Sweeney Conrad has validly entered into this Agreement and has the legal power to do so. You warrant that you have validly entered into this Agreement and have the legal power to do so.

EXCEPT AS EXPRESSLY PROVIDED ABOVE, THE SWEENEY CONRAD SERVICES ARE PROVIDED "AS IS" AND "AS AVAILABLE" WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. Sweeney Conrad specifically disclaims all warranties and conditions of any kind, including all implied warranties and conditions of merchantability, fitness for a particular purpose, title, non-infringement, freedom from defects, uninterrupted use and all warranties implied from any course of dealing or usage of trade. Sweeney Conrad does not warrant that (a) the Services will meet your requirements, (b) operation of the Services will be uninterrupted or virus- or error-free or (c) errors will be corrected. Any oral or written advice provided by Sweeney Conrad or its authorized agents does not and will not create any warranty. SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OF IMPLIED WARRANTIES WHICH MEANS THAT SOME OR ALL OF THE ABOVE EXCLUSIONS MAY NOT APPLY TO YOU.

YOUR USE OF THE SERVICES IS AT YOUR OWN RISK.

LIMITATION OF LIABILITY AND EXCLUSION OF CERTAIN DAMAGES

YOU FURTHER WAIVE AND AGREE NOT TO ASSERT AGAINST SWEENEY CONRAD ANY INCIDENTAL, SPECIAL, CONSEQUENTIAL, EXEMPLARY, PUNITIVE, ENHANCED OR INDIRECT DAMAGES, INCLUDING, WITHOUT LIMITATION, LOST PROFITS OR REVENUE, DIMINUTION IN VALUE, DAMAGES FOR LOSS OR CORRUPTION OF DATA OR PROGRAMS, SERVICE INTERRUPTIONS AND PROCUREMENT OF SUBSTITUTE SERVICES, EVEN IF SWEENEY CONRAD KNOWS OR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, IN EACH CASE, ARISING OUT OF OR RELATING TO THE USE OR INABILITY TO USE THE SERVICE OR TO THE CONDUCT OF YOU OR ANY OTHER REGISTERED USER IN CONNECTION WITH THE USE OF THE SERVICE.

The foregoing disclaimer of liability will not apply to the extent prohibited by applicable law in the jurisdiction of your place of residence. You acknowledge and agree that the above limitations of liability together with the other provisions in this Agreement that limit liability are essential terms and that Sweeney Conrad would not be willing to grant you the rights set forth in this Agreement but for your agreement to the above limitations of liability.

FINANCIAL DISCLAIMER

SWEENEY CONRAD PROVIDES THE SERVICES, INCLUDING THE RELATED INFORMATION AND CONTENT (COLLECTIVELY, "**INFORMATION**") FOR INFORMATIONAL PURPOSES ONLY AND IS NOT INTENDED TO SUBSTITUTE FOR OBTAINING ACCOUNTING, TAX, OR FINANCIAL ADVICE FROM A PROFESSIONAL ACCOUNTANT. ANY U.S. FEDERAL TAX ADVICE CONTAINED IN THIS WEBSITE IS NOT INTENDED TO BE USED FOR THE PURPOSE OF AVOIDING PENALTIES UNDER U.S. FEDERAL TAX LAW.

DISPUTE RESOLUTION

If you have a complaint about the Services, please contact Sweeney Conrad via email at information@sweeneyconrad.com.

YOU AND SWEENEY CONRAD ARE AGREEING TO GIVE UP ANY RIGHTS TO LITIGATE CLAIMS IN A COURT OR BEFORE A JURY, OR TO PARTICIPATE IN A CLASS ACTION OR REPRESENTATIVE ACTION WITH RESPECT TO A CLAIM. OTHER RIGHTS THAT YOU WOULD HAVE IF YOU WENT TO COURT MAY ALSO BE UNAVAILABLE OR MAY BE LIMITED IN ARBITRATION.

YOU AGREE THAT ANY CAUSE OF ACTION ARISING OUT OF OR RELATED TO THE SERVICES MUST COMMENCE WITHIN ONE (1) YEAR AFTER THE CAUSE OF ACTION ACCRUES; OTHERWISE, THE CAUSE OF ACTION IS PERMANENTLY BARRED.

ANY CLAIM, DISPUTE OR CONTROVERSY (WHETHER IN CONTRACT, TORT OR OTHERWISE, WHETHER PRE-EXISTING, PRESENT OR FUTURE, AND INCLUDING STATUTORY, CONSUMER PROTECTION, COMMON LAW, INTENTIONAL TORT, INJUNCTIVE AND EQUITABLE CLAIMS) BETWEEN YOU AND US ARISING FROM OR RELATING IN ANY WAY TO THE SERVICES, WILL BE RESOLVED EXCLUSIVELY AND FINALLY BY BINDING ARBITRATION.

The arbitration will be administered by the American Arbitration Association ("**AAA**") in accordance with the Consumer Arbitration Rules (the "**AAA Rules**") then in effect, except as modified by this Section. (The AAA Rules are available at www.adr.org/arb_med or by calling the AAA at 1-800-778-7879.) The Federal Arbitration Act will govern the interpretation and enforcement of this Section.

The arbitrator will have exclusive authority to resolve any dispute relating to arbitrability and/or enforceability of this arbitration provision, including any unconscionability challenge or any other challenge that the arbitration provision or this Agreement is void, voidable, or otherwise invalid. The arbitrator will be empowered to grant whatever relief would be available in court under law or in equity. Any award of the arbitrator(s) will be final and binding on each of the parties, and may be entered as a judgment in any court of competent jurisdiction.

You agree to an arbitration on an individual basis. In any dispute, NEITHER YOU NOR SWEENEY CONRAD WILL BE ENTITLED TO JOIN OR CONSOLIDATE CLAIMS BY OR AGAINST OTHER CUSTOMERS IN COURT OR IN ARBITRATION OR OTHERWISE PARTICIPATE IN ANY CLAIM AS A CLASS REPRESENTATIVE, CLASS MEMBER OR IN A PRIVATE ATTORNEY GENERAL CAPACITY. The arbitral tribunal may not consolidate more than one person's claims, and may not otherwise preside over any form of a representative or class proceeding. The arbitral tribunal has no power to consider the enforceability of this class arbitration waiver and any challenge to the class arbitration waiver may only be raised in a court of competent jurisdiction.

If any provision of this arbitration agreement is found unenforceable, the unenforceable provision will be severed and the remaining arbitration terms will be enforced.

GOVERNING LAW AND JURISDICTION

This website is operated from the US. All matters arising out of or relating to this Agreement are governed by and construed in accordance with the internal laws of the State of Washington without giving effect to any choice or conflict of law provision or rule (whether of the State of Washington or any other jurisdiction) that would cause the application of the laws of any jurisdiction other than those of the State of Washington.

NOTICE TO CALIFORNIA RESIDENTS

BY USING THE SERVICES, YOU WAIVE YOUR RIGHTS WITH RESPECT TO CALIFORNIA CIVIL CODE SECTION 1542, WHICH SAYS "A GENERAL RELEASE DOES NOT EXTEND TO CLAIMS WHICH THE CREDITOR DOES NOT KNOW OR SUSPECT TO EXIST IN HIS FAVOR AT THE TIME OF EXECUTING

THE RELEASE, WHICH, IF KNOWN BY HIM MUST HAVE MATERIALLY AFFECTED HIS SETTLEMENT WITH THE DEBTOR."

If the Services are at any time deemed an electronic commercial service (as defined under California Civil Code Section 1789.3), California residents are entitled to the following specific consumer rights information:

The provider of the Services is:

Sweeney Conrad, P.S.
10210 NE Points Dr.
Suite 300
Kirkland, WA 98033

If the Services are deemed as electronic commercial service, you may file a complaint regarding the Services or to receive further information regarding use of the Services by sending a letter to the attention of "Legal Department" at the above address.

INTERNATIONAL USE

If you are not a United States resident and you are accessing our Services from outside the United States, you agree to transfer certain information outside your home country to us and that you will follow all the laws that apply to you.

Sweeney Conrad's servers and operations are located primarily in the United States and our policies and procedures are based primarily on United States law. Because of this, the following provisions apply specifically to users located outside of the United States: (i) you consent to the transfer, storage and processing of your information (including Submissions and Personal Data) to and in the United States and/or other countries; (ii) if you are using the Services from a country embargoed by the United States, or are on the United States Treasury Department's list of "Specially Designated Nationals," you are not authorized to access or use the Services; and (iii) you agree to comply with all local laws, rules and regulations including all laws, rules and regulations in effect in the country in which you reside and the country from which you access the Services. The Services are not intended for distribution to or use by any person or entity in any jurisdiction or country where such distribution or use would be contrary to law or regulation, or which that would subject Sweeney Conrad or its affiliates to any registration requirement within such jurisdiction or country.

TERMINATION

You may terminate your Account at any time for any reason effective upon written notice to Sweeney Conrad. Sweeney Conrad reserves the right immediately to suspend or terminate your access to the Services without notice if Sweeney Conrad believes you violated this Agreement.

Termination will not limit any of Sweeney Conrad's other rights or remedies. The Sections titled "Sweeney Conrad Content", "Submissions", "Disclaimer of Warranties", "Limitation of Liability", "Dispute Resolution", "General Terms" and any other provision that is intended to survive termination shall survive termination of this Agreement.

DMCA COPYRIGHT NOTICE AND TAKEDOWN POLICY

If you are a copyright owner and you believe your work has been copied and used improperly on the Services, please contact our copyright compliance officer. Pursuant to 17 U.S.C. § 512(c), to be effective, the notification to us must include the following information: (1) physical or electronic signature of a person authorized to act on behalf of the copyright owner; (2) description of the work you claim has been infringed and the description and location of the alleged infringement the Services; (3) your contact information including address, telephone number and email address; (4) a written statement that you have a good faith

belief the accused usage is infringing; and (5) a statement by you under penalty of perjury that the information in the notice is accurate and that you are duly authorized to act on behalf of the copyright owner.

Contact our copyright agent at: Emily Taibl, c/o Sweeney Conrad, P.S., 10210 NE Points Dr., Suite 300, Kirkland, WA 98033, etaibl@sweeneyconrad.com, (425) 629-1990.

Please note that under Section 512(f) of the Digital Millennium Copyright Act, any person who knowingly materially misrepresents that material is infringing may be subject to liability. If you are unsure whether material on the Services is infringing, we suggest that you contact an attorney prior to sending notice.

LINKS TO OTHER WEBSITES AND SERVICES

The Services contain links to other websites and services that we think may interest you, including social networking (collectively, "**Linked Services**"). Sweeney Conrad is not responsible for, or in control of, Linked Services or for any information or materials on, or any form of transmission received from, any Linked Service. The inclusion of a link does not imply endorsement by Sweeney Conrad of the Linked Services or any association with the operators of the Linked Services. Sweeney Conrad does not investigate, verify or monitor the Linked Services. Sweeney Conrad provides links to Linked Services for your convenience only. You access Linked Services at your own risk.

GENERAL TERMS

- This Agreement (i) inures to the benefit of and will be binding upon Sweeney Conrad and its, and you and your, successors and assigns, respectively and (ii) may be assigned by Sweeney Conrad freely, but you may not assign this Agreement without the prior express written consent of Sweeney Conrad.
- This Agreement contains the entire understanding by and between Sweeney Conrad and you with respect to the Services.
- If any provision of this Agreement is invalid, illegal, void or unenforceable, then that provision will be deemed severed from this Agreement and will not affect the validity or enforceability of the remaining provisions of this Agreement.
- The failure by us to enforce any right or provision of this Agreement will not constitute a waiver of future enforcement of that right or provision. The waiver of any right or provision will be effective only if in writing and signed by a duly authorized representative of Sweeney Conrad, LLC.
- Nothing contained in this Agreement will be deemed to constitute Sweeney Conrad or you as the agent or representative of the other or as joint venturers or partners.
- If Sweeney Conrad is or you are prevented from performing or unable to perform any obligation under this Agreement due to any cause beyond the reasonable control of the party invoking this provision, the affected party's performance will be extended for the period of delay or inability to perform due to such occurrence.
- The headings and captions contained herein are for convenience only.
- This Agreement and all related documentation will be drafted in English. While certain text in this Agreement may be made available in languages other than English (whether translated by a person or solely by computer software), the English language version controls.

QUESTIONS ABOUT THE SERVICES

If you have a question about the Services, please contact Sweeney Conrad in one of the following ways:

Email: information@sweeneyconrad.com
Phone: (425) 629-1990
Mail: Sweeney Conrad, P.S.
10210 NE Points Dr.
Suite 300
Kirkland, WA 98033