Privacy Policy

CSA Partners (csap.com)
Effective Date / Last Updated: June 16, 2026

At CSA Partners, we are committed to providing exceptional experiences through innovative, data-driven solutions. Our clients, ranging from businesses to investors, rely on us to help them navigate the complexities of real estate tax studies. This Privacy Policy explains how CSA Partners ("CSA Partners," "we," "us," or "our") collects, uses, shares, and safeguards the personal information of business representatives, website visitors, job applicants, and other individuals who interact with our website and services.

This Policy does not apply to data we process on behalf of clients using our tools and platforms. In those instances, we act strictly as a service provider or processor, under the direction and written agreement of our clients, and we do not use that client data for our own purposes (including to train general-purpose AI models).

Information We Collect

Information You Provide to Us

We collect personal information directly from you when you:

- Fill out a form, register an account, or contact us — including your name, organization, contact details, and other personally identifiable information.
- Engage in financial transactions with us — including relevant billing or payment data, such as bank details and transaction history.
- Communicate with us — including the content of your messages, inquiries, feedback, and chat conversations.
- Opt in to marketing — including your communication preferences and interactions with our promotional content.

Automatically Collected Information

We, and our service providers, gather technical data from your device and about how you interact with our services, including:

- Device data: IP address, browser type, operating system, device model, and language settings.
- Usage data: pages viewed, time spent on pages, navigation behavior, referral sources, clicks on links or files, and time of access.

AI Chat & Virtual Assistant

Our website offers an AI-powered chat assistant provided through the our third-party technology provider to engage with visitors, answer questions, and help us identify and follow up on potential leads. When you use the chat assistant:

- Your conversations may be monitored, recorded, and stored, including the messages you type and information you choose to share.
- Conversations may be processed by third-party and by us to respond to you, personalize your experience, generate and qualify leads, conduct analytics, improve the assistant, and maintain quality and security.
- Transcripts may be associated with other information we hold about you (such as your contact details and website activity) and may be shared with our team to follow up with you.
- Before a chat begins, the assistant displays a notice describing this recording and use. By continuing the conversation after that notice, you consent to the monitoring, recording, and use of the chat as described. If you do not consent, please do not use the chat assistant; you may instead contact us by email or phone, or through our contact form.

Please do not enter sensitive information (such as financial account numbers, government identifiers, or health information) into the chat assistant.

Call Recordings

Telephone and any video conversations may be recorded for quality assurance, training, and customer-support purposes, and may be used to create summaries, measure sentiment, and improve service delivery. Where required by law, we will provide notice and obtain consent at the start of the call.

Use of AI and Automated Tools

We may use artificial intelligence (AI) tools to analyze client-submitted property information in order to generate insights, identify patterns, and assist in delivering our real estate tax services. These tools are used to enhance accuracy and efficiency. All AI-driven analysis is subject to expert human review before it is included in client-facing deliverables.

Information from Other Sources

We may supplement personal information with data from external sources, including social media platforms where we maintain a presence, and marketing partners and data providers that support our outreach and analytics efforts.

Third-Party Authentication

If you choose to sign in or register using Google OAuth, we receive basic account information from your Google profile, such as your name and email address, solely to authenticate your identity and provide access to our platform. We do not access your Google account or use this data for any other purpose without your consent, and we do not request Google account data beyond what is necessary for authentication unless you explicitly authorize it. You may manage or revoke access at any time via your Google account permissions page.

Categories of Personal Information We Collect

In the preceding 12 months, we may have collected the following categories of personal information. We retain each category only as long as necessary for the purposes described or as required by law.

Category	Examples	Sources	Primary Purposes
Identifiers	Name, email, phone, postal address, organization, account/login identifiers.	You; OAuth sign-in; marketing partners.	Service delivery, communication, account access.
Commercial & financial information	Billing details, payment/bank information, transaction history.	You.	Processing transactions; billing; compliance.
Internet/network activity	IP address, device and browser data, pages viewed, clicks, navigation, referral source, session recordings.	Automatic collection; cookies; session-replay tools.	Analytics, security, personalization, usability.
Communications content	Messages, inquiries, feedback, call recordings, and AI chat transcripts.	You; phone system; AI chat assistant.	Support, quality assurance, lead generation, training.
Professional/employment information	Résumé, work history, application details.	You (job applicants).	Recruitment and hiring.
Sensitive personal information	Financial account / payment information; account log-in credentials.	You.	Limited to providing requested services and security.
Inferences	Preferences and behavior derived from the above.	Derived internally.	Personalization and service improvement.

How We Use Your Information

We use personal data for purposes including:

- Service delivery and operations — to provide and maintain our offerings and meet contractual obligations.
- Customer support and communication — responding to inquiries, sharing updates, and handling administrative matters.
- Personalization and improvement — analyzing trends to refine the user experience and enhance performance, including improving our AI chat assistant.
- Lead generation — identifying and following up with prospective clients, including through the AI chat assistant.

- Research and development — using de-identified or aggregated data to guide future innovations.
- Marketing and advertising — sending promotional communications and serving tailored ads (you can opt out at any time).
- Compliance and risk management — meeting legal and regulatory obligations and investigating potential violations.

Use of AI and automated tools. We may use artificial intelligence tools to analyze client-submitted property information to generate insights, identify patterns, and assist in delivering our real estate tax services. All AI-driven analysis is subject to expert human review before it is included in client-facing deliverables. We may also use personal information from our own website visitors and marketing contacts to improve and tune our AI chat assistant and related tools. We do not use client data that we process as a service provider to train general-purpose AI models. Where we would use your personal information to train models beyond improving the service you are using, we will provide notice and an opportunity to opt out; contact us at the address below to opt out.

Sharing of Personal Information

CSA Partners may disclose personal data to:

- Third parties at your request or direction.
- Service providers and processors who support our operations (e.g., IT, hosting, analytics, communications, and our AI chat provider00), under contracts that restrict their use of the data to providing services to us.
- Legal and professional advisors assisting with compliance and risk management.
- Potential buyers or partners in corporate transactions.
- Advertising partners for targeted advertising purposes, subject to your opt-out rights described below.
- Government authorities and other entities when required by law or to defend legal claims.

We do not sell personal information for money. However, when we disclose certain online identifiers and activity to advertising partners to deliver targeted advertising, this may be considered “sharing” (or a “sale”) for cross-context behavioral advertising under some U.S. state privacy laws. You can opt out as described in “Your Privacy Choices” below.

Your Privacy Rights

Depending on your location, you may have the right to:

- Request details about, and access a copy of, the personal information we hold about you, in a portable format.
- Request correction or deletion of your information.

- Opt out of marketing communications and of the sale or sharing of personal information for advertising.
- Limit the use and disclosure of sensitive personal information.
- Restrict or object to certain data uses.

California Privacy Rights (CCPA/CPRA)

If you are a California resident, you may have additional rights under the California Consumer Privacy Act, as amended by the California Privacy Rights Act, including the right to: know what personal information we collect and how we use it; access or delete your personal information; correct inaccurate information; opt out of the sale or sharing of personal information (we do not sell personal information for money); and limit the use and disclosure of sensitive personal information. We will not discriminate or retaliate against you for exercising any of these rights.

Sensitive Personal Information

Some information we collect — such as financial account or payment information and account log-in credentials — may be considered "sensitive personal information." We use and disclose this information only as necessary to provide our services, process transactions, prevent fraud, ensure security, and comply with law. We do not use sensitive personal information to infer characteristics about you. You may request that we limit our use of sensitive personal information as described below.

Your Privacy Choices — Do Not Sell or Share / Opt-Out

To opt out of the sale or sharing of your personal information for targeted advertising, or to limit the use of sensitive personal information, you can use the "Do Not Sell or Share My Personal Information" link on our website or contact us using the details below. We also recognize opt-out preference signals, including the Global Privacy Control (GPC), transmitted by your browser, and will treat a valid signal as a request to opt out for that browser or device.

How to Exercise Your Rights

To make a privacy-related request, contact us at privacy@csap.com or use our online request form. We will verify your identity before processing your request and may need to ask for additional information to do so. You may use an authorized agent to submit a request on your behalf, subject to verification of the agent's authority. We aim to respond within 45 days; if we need more time (up to an additional 45 days), we will notify you. If we decline a request, you may appeal by contacting us at the same address.

Cookies & Tracking Technologies

We and our service providers use cookies, pixels, tags, and similar technologies — including Google Tag Manager, analytics tools, advertising tags, and session-replay tools — to operate and secure the site, remember preferences, measure performance, and support marketing. You can control cookies through your browser settings, through any consent or preferences tool we make available on the site, and through industry opt-out resources. As noted above, we honor the Global Privacy Control signal for opt-out of sale/sharing.

Data Security and Retention

CSA Partners employs a combination of technical, administrative, and physical safeguards to protect personal information. While we strive to maintain strong security, no method of transmission over the internet is entirely secure.

We retain personal data only as long as necessary to fulfill the purposes described in this Policy, to provide our services, to comply with legal, tax, and regulatory obligations, to resolve disputes, and to enforce our agreements. When personal information is no longer needed, we securely delete or de-identify it. Retention periods vary by data type; for example, transaction records are kept as required by applicable financial and tax laws, and marketing data is kept until you opt out or the data is no longer useful for the purpose collected.

International Data Transfers

If your information is processed outside your home country, we take appropriate measures to protect it under applicable data-protection laws, including standard contractual clauses and other recognized legal frameworks.

Children's Privacy

Our services are not intended for individuals under the age of 16. We do not knowingly collect personal information from children. If we become aware that we have collected personal data from a minor without appropriate consent, we will take steps to delete it.

Careers and Recruitment

If you apply for a position at CSA Partners or interact with our recruitment team, we collect and process information related to your application, which may include your résumé, contact details, work history, and other information relevant to the hiring process. We use this information to evaluate your application and manage our recruitment process.

Updates to This Policy

We may update this Privacy Policy from time to time. When we make changes, we will revise the "Effective Date / Last Updated" date at the top of this document and, where required by law, provide additional notice. We review this Policy at least annually.

Contact Us

If you have questions or concerns about our privacy practices, or to exercise your rights, please contact us:

Privacy requests: privacy@csap.com

General inquiries: info@csap.com

Mailing address: 2570 W 600 N #100, Lindon, UT 84042