

**Document Hierarchy:** This document is provided for guidance only. In case of any conflict, `COMMERCIAL_LICENSE.md` is the authoritative and controlling document for all commercial licensing terms and obligations, and `LICENSE (AGPL-3.0)` controls for open-source licensing.

## Licensing & Access Requests

FoxML Core is available under annual commercial licensing for organizations.

Commercial license pricing is aligned with enterprise quant infrastructure standards.

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## License Requirements & Definitions

### Business / Internal Use

**“Business use” or “internal use”** means any Commercial Use (as defined in `COMMERCIAL_LICENSE.md` Section 1), including but not limited to:

- Internal tools, dashboards, or research pipelines
- Proofs of concept, evaluations, or pilot projects (regardless of whether they generate revenue or are “experimental”)
- Non-revenue or “experimental” usage (even if not generating revenue, experimental use within a business context requires a commercial license)
- Use by employees, contractors, interns, or affiliates in the course of their work
- Use by sole proprietors, freelancers, or independent contractors in connection with any business activity or client work
- Use in any environment (development, testing, staging, or production) within a business or organizational context

**Any business or internal use by or for a commercial organization requires a commercial license**, regardless of whether the use directly generates revenue, is experimental, is a proof of concept, or is claimed to be “non-commercial” or “research-only.” See `COMMERCIAL_LICENSE.md` Section 1 for the complete definition of “Commercial Use.”

**FOR THE AVOIDANCE OF DOUBT:** There is no “free trial” or “evaluation period” for Commercial Use (as defined in `COMMERCIAL_LICENSE.md` Section 1). Any use within a business context requires a commercial license from the start. The 30-day evaluation period described in `LEGAL/SUPPORT_POLICY.md` is for non-commercial evaluation only and does not permit Commercial Use.

### Academic & Personal Use (AGPL-3.0 Only)

**“Non-commercial academic or personal research use”** means:

- Use by an individual in their personal capacity (meaning: not as an employee, contractor, or agent of any business, organization, or other entity; not for the benefit of any third party; and not in connection with any commercial activity, including but not limited to freelance work, consulting, or sole proprietorship activities), or
- Use by a degree-granting educational or non-profit research institution that is: (i) recognized as a tax-exempt organization under applicable law, (ii) not owned, controlled by, or operated

for the benefit of any commercial entity, and (iii) where the research results are not used to support commercial operations, trading, revenue-generating activities, or any business purpose of any commercial organization

**EXPLICIT EXCLUSIONS FROM NON-COMMERCIAL USE:** - **Sole proprietorships, freelancers, and independent contractors** — Any use by a sole proprietor, freelancer, or independent contractor, even if claimed to be “personal,” requires a commercial license if the Software is used in connection with any business activity, client work, or revenue-generating activity - **For-profit educational institutions** — Any use by for-profit universities, bootcamps, training companies, or corporate training programs requires a commercial license - **Corporate training and bootcamps** — Any use for corporate training, professional development, bootcamp instruction, or educational services provided by commercial entities requires a commercial license, regardless of whether the training is provided to employees or external students - **Corporate research labs** — Any research conducted by, for, or on behalf of a commercial organization requires a commercial license, regardless of whether the research lab has non-profit status or is operated as a separate entity - **University research with commercial ties** — Research funded by, sponsored by, or operationally integrated into commercial organizations requires a commercial license, even if performed at a non-profit institution - **Development, testing, and staging environments** — Any use in development, testing, staging, quality assurance, or other non-production environments within a business context requires a commercial license, regardless of whether such environments are labeled as “experimental” or “non-production” - **Open source contributions** — Contributing code, fixes, or improvements to the open-source version does not exempt Commercial Use (as defined in `COMMERCIAL_LICENSE.md` Section 1) from licensing requirements

**Academic research that is conducted for, funded by, sponsored by, or operationally integrated into a commercial organization’s activities requires a commercial license,** even if the research is performed by students, interns, or contractors.

**IMPORTANT:** Use of the AGPL-3.0 version for any commercial purpose (including but not limited to: business operations, trading, investment decisions, client services, or any revenue-generating activity) is a violation of the AGPL-3.0 license terms and may result in copyright infringement claims. If you have used the Software commercially under AGPL-3.0, you must immediately obtain a commercial license and may be required to pay retroactive licensing fees.

See `DUAL_LICENSE.md` for complete dual licensing information.

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## Usage Scenarios

Scenario	License Required	Notes
<b>Personal / Individual</b>	AGPL-3.0	Personal study, experimentation, or non-commercial research by an individual (NOT for business, client work, or revenue-generating activities)
<b>Academic Institution</b>	AGPL-3.0	Non-profit, tax-exempt educational institution, research not supporting commercial operations (for-profit universities require commercial license)
<b>Sole Proprietor / Freelancer</b>	Commercial	Any use in connection with business activity, client work, or revenue generation (even if claimed to be “personal”)
<b>Startup / Small Business</b>	Commercial	Any business entity, regardless of size, revenue, profitability, or stage (including pre-revenue startups, companies operating at a loss, or companies in development phase)

Scenario	License Required	Notes
<b>Subsidiary / Affiliate</b>	Commercial	Each legal entity (including subsidiaries, affiliates, and parent companies) must have its own license. A parent company's license does not cover subsidiaries, and vice versa
<b>Hedge Fund / Trading Firm</b>	Commercial	Trading, investment, or financial decision-making
<b>Corporate Research Lab</b>	Commercial	Research conducted by or for a commercial organization (regardless of non-profit status of lab)
<b>University Research (Corporate-Funded)</b>	Commercial	Research funded by, sponsored by, or integrated into commercial operations
<b>Internal Tools / Dashboards</b>	Commercial	Any internal use within a business organization (including experimental or non-revenue use)
<b>Proof of Concept / Pilot</b>	Commercial	Evaluation or pilot projects within a business context (no free trial for Commercial Use)
<b>SaaS / Hosted Service</b>	Commercial + Custom	Requires explicit written permission and custom licensing terms
<b>Vendor / Reseller</b>	Commercial + Custom	Requires separate commercial agreement

**When in doubt, assume a commercial license is required. Contact [jenn.lewis5789@gmail.com](mailto:jenn.lewis5789@gmail.com) for clarification.**

### **Annual License Tiers**

Tiers are based on total headcount of the legal entity (not just users of the Software).

- 1–10 employees — \$150,000 / year
- 11–50 employees — \$350,000 / year
- 51–250 employees — \$750,000 / year
- 251–1000 employees — \$1,500,000–\$2,500,000 / year (based on scope, starting at \$1,500,000)
- 1000+ employees — \$5,000,000–\$12,000,000+ / year (custom enterprise quote)

To request access or begin the licensing process, email:

[EMAIL] [jenn.lewis5789@gmail.com](mailto:jenn.lewis5789@gmail.com)

Please include:

- Your full name
- Organization name
- Work email
- Company website or LinkedIn
- Organization size (from tiers above)
- Primary use case (1–3 sentences)
- Desired start timeline
- Any special requirements (optional)

Once received, we will review your information and reply with the appropriate licensing option, pricing confirmation, and the Stripe payment link for your organization.

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### **Optional Enterprise Add-Ons**

#### **Dedicated Support SLA — \$5,000–\$20,000 / month**

Tiered support with defined response times, coverage, and channels. Pricing based on SLA level:

- **Business Support** (\$5,000–\$8,000/month):
  - Response: Initial acknowledgement within 1 business day, substantive response within 3 business days
  - Coverage: Business hours (US Central Time, Monday–Friday)
  - Channels: Dedicated support email, private issue tracking
  - Includes: Priority bug fixes, deployment guidance, integration questions, configuration assistance

- **Enterprise Support** (\$10,000–\$15,000/month):
  - Response: Initial acknowledgement same business day, substantive response within 1–2 business days
  - Coverage: Business hours with scheduled call windows (pre-arranged)
  - Channels: Dedicated enterprise support email, optional scheduled calls, prioritized issue handling
  - Includes: Priority bug fixes, deployment guidance, integration questions, architecture review, scheduled support calls (limited hours)
- **Premium Support** (\$15,000–\$20,000/month):
  - Response: Initial acknowledgement same business day (typically within hours), substantive response within 1 business day
  - Coverage: Business hours with flexible scheduling
  - Channels: Dedicated premium support email, scheduled support calls (flexible scheduling), direct access to engineering resources
  - Includes: Highest priority bug fixes, deployment guidance, architecture review, direct engineering consultation, flexible support call scheduling

**Note:** Support SLAs do not include custom feature development, which requires separate consulting agreements or Statements of Work (SOWs). See `LEGAL/SUPPORT_POLICY.md` and `LEGAL/SERVICE_LEVEL_AGREEMENT.md` for complete details.

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## Integration & On-Prem Setup — \$100,000–\$500,000 one-time

One-time professional services for integration and on-premises deployment setup. Pricing depends on infrastructure complexity, security review requirements, and environment count (dev/staging/production).

**Scope (defined via separate SOW):** - Architecture review and integration planning - On-premises deployment configuration - Security review and compliance alignment - Multi-environment setup (dev/staging/production) - Initial integration with client infrastructure

**Excludes:** - Ongoing feature development (separate consulting) - Ongoing maintenance (covered by support SLA or separate agreement) - Custom feature development (separate SOW)

**Note:** All integration work is scoped via a separate Statement of Work (SOW) with defined deliverables and milestones.

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## Onboarding — \$25,000–\$75,000 one-time

One-time onboarding services to accelerate adoption. Pricing based on scope:

- **Basic Onboarding** (\$25,000–\$40,000):
  - Training sessions on core functionality
  - Architecture review and best practices
  - Initial pipeline design assistance
  - Standard documentation and guides
- **Custom Onboarding** (\$40,000–\$75,000):
  - Custom training workshops tailored to client workflows

- Deep architecture review and optimization recommendations
- Hands-on assistance designing first production pipelines
- Custom best-practices documentation tailored to client infrastructure

**Note:** Higher license tiers may include basic onboarding. Custom onboarding is always available as an add-on.

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### **Private Slack / Direct Founder Access — \$30,000–\$120,000 / year**

Direct communication channel with founder for strategic discussions and high-level guidance. **Not a replacement for paid support SLA** (these are separate services).

**Included:** - Up to 3–5 named contacts (depending on tier) - Business hours response (US Central Time, Monday–Friday) - Response within ≤24 hours during business hours - Strategic discussions, architecture guidance, roadmap alignment

**Excludes:** - Feature development requests (requires separate consulting/SOW) - Technical support (covered by support SLA) - Emergency response (covered by support SLA) - Non-business-hours availability

**Boundaries:** - This is a communication channel for strategic alignment, not a 24/7 hotline - Technical issues should go through the support SLA channels - Custom development requests require separate consulting agreements

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### **Additional User Seats — \$500–\$2,000 / seat / year**

Additional named users beyond the included seats per license tier.

**Included Seats per License Tier:** - 1–10 employees: Up to 10 named users included - 11–50 employees: Up to 25 named users included - 51–250 employees: Up to 50 named users included - 251–1000 employees: Up to 100 named users included - 1000+ employees: Up to 200 named users included (custom)

**Additional Seats:** - Additional named users beyond the included count: \$500–\$2,000 per seat per year - Pricing depends on seat type (standard user vs. power user/administrator) - Seats are for named individuals, not shared accounts

**Note:** License tiers are based on total company headcount, not seat count. Additional seats are for organizations needing more named users than the tier includes.

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### **Adaptive Intelligence Layer (Tier 5 only) — +\$2,000,000–\$5,000,000 / year**

Advanced orchestration and adaptive pipeline capabilities. **Subject to roadmap availability and separate SOW with defined milestones.**

**What This Includes:** - Advanced orchestration and automated strategy search - Adaptive pipelines and agents using FoxML Core infrastructure - Automated feature/target discovery and optimization - Self-tuning model selection and ensemble management

**What This Does NOT Include:** - Generic AGI or unlimited research promises - Custom feature development outside the adaptive layer scope - Guaranteed delivery timelines without milestone-based SOW

**Requirements:** - Available only for Tier 5 (1000+ employees) customers - Requires separate Statement of Work (SOW) with defined milestones - Subject to roadmap availability and engineering capacity - Pricing based on scope and complexity

**Note:** This is a premium add-on for organizations requiring the highest level of automation and adaptive intelligence. All work is scoped via a separate SOW with milestone-based delivery.

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## Delivery Model

Commercial licenses include access to the enterprise base repository. Custom client repositories with specific configurations and integrations are available for additional customization needs. See `ENTERPRISE_DELIVERY.md` for details on the repository structure, IP ownership, and delivery tiers.