**TAX SOFTWARE QUOTE**

We are pleased to extend to you (“**you**” or “**your**”) the offer to purchase the ProConnect professional tax software, Tax Form Modules, services, and user entitlements (collectively, “**Tax Software**”) and pricing contained in the attached accompanying custom quote (“**Quote**”) prepared especially for you.

Please carefully review all information contained in the Quote, and all the terms below which, together with the Quote, comprise the agreement (“**Agreement**”) between you and Intuit to purchase the latest Tax Software release. This Agreement also supplements any End User License Agreement, support policies, and other services terms that accompany the actual Tax Software, which together with the Agreement, govern your use of the Tax Software.

**SUPPLEMENTAL TERMS AND CONDITIONS**

1. **Accepting the Agreement**. This Agreement is extended to you for a limited time only. If you accept all the terms of the Agreement, **you must acknowledge your acceptance by e-signature or by clicking “I Agree” as directed below**. To receive the Tax Software for the tax year and at the discounted pricing in the attached Quote, your signed Agreement must be received within 30 days after the expiry date imprinted on the Quote, after which time the Quote may no longer be valid. If you do not accept the Agreement, or any of its terms, then please do not sign or click “I Agree” and you are not eligible to redeem the Quote offer.
2. **Term**. If accepted by you, the term of this Agreement will continue for 3 years from the date of your acceptance (“**Term**”)**.**
3. **Participating in optional programs**. The Quote includes the invitation to apply to participate in either or all the below-named optional add-on programs (“**Program(s)**”) for the opportunity to earn specified dollar credits or incentives. Regardless of the Agreement Term, if you choose to apply and are eligible to participate (whether you are a current or first-time Program participant), once you enroll in a Program, for as long as the Program is available and **provided that you maintain an Intuit account in good standing, your participation in any Program, including obligation for compliance with Program requirements and receipt of Program credits and other benefits, then your designation by Intuit as an active Program participant will continue uninterrupted for as long as you remain eligible, until or unless terminated by you or Intuit (however, please note that regardless of Intuit’s designation, you may still need to take action each year to notify the third party Program provider of your intent to renew or continue your Program enrollment)**. Certain Program features or mechanics, refunds or other thresholds for earning credits or discounted or free software, may vary based on whether you are a first-time Program participant or a participant that is renewing participation after cancellation or expiration of an initial Term. You may contact Intuit to terminate your participation in any Program at any time by calling the number below\*:

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| **Pay-by-Refund**  Earn credits for every active tax year federal refund transfer that is funded through a participating bank. | | **ID Theft Restoration & Audit Assistance**  Earn credits for every funded refund transfer client you enroll for first-time membership. | |
|  | ***Terms, conditions, and restrictions apply****\** | |  |

\*For complete Program details, including eligibility and participation requirements, restrictions, and currently available credits, please see <https://taxpro.intuit.com/client-benefit-suite>, or call 1-800-811-8943.

1. **Making payments**. Only one form of payment is accepted per Quote and Tax Software order. For Tax Software orders placed under the enclosed Quote on or before November 1st, your authorized payment method will be debited on or about November 2nd (plus applicable tax, S&H). For Tax Software orders placed after November 1st, your authorized payment method will be debited immediately for the total cost of the order (plus applicable tax, S&H). In future years, we will provide you with a new quote for the then-current Tax Software version and applicable tax year. Certain Program participants meeting eligibility requirements for receipt of free Tax Software for completion of 100% of the specified minimum volume or number of federal funded Pay-by-Refund transactions filed through participating banks from January 1st through April 15th (“Tax Year”). Visit the website address above to view Pay-by-Refund Program categories and corresponding transaction volumes or thresholds. If you are a Program participant who received free Tax Software, but did not complete 100% of the specified Pay-by-Refund transactions during the applicable Tax Year, then you agree to pay a prorated amount (equal to the percentage shortage multiplied by up to the then-current standard price) for the Tax Software, which will be billed to you and charged on or about May 1st of the then-current year to the authorized payment method indicated in your primary billing profile.
2. **General**. The custom or discounted pricing provided in the Quote is not available to all ProConnect customers. You agree not to disclose or share the pricing or other details of this Agreement with anyone outside your business. The offer and pricing contained in the Quote is not eligible for any other discounts, and may not be assigned, exchanged, sold, transferred, combined, or redeemed for cash or other goods and services not expressly stated as included in this Agreement. The Quote is subject to change if not accepted by its expiry date and Tax Software and optional Programs, and their respective features, terms, prices, services, or support offerings, may be terminated or modified at any time, with or without notice to you, in Intuit’s sole discretion. An IRS-authorized Electronic Filing Identification Number (EFIN) is required to e-file tax returns using the Tax Software (see IRS Form 8633).
3. **Cancellation**. This Agreement will continue for the Term, unless and until you cancel. **TO CANCEL** this Agreement at any time, contact us at 1-800-811-8943. If you cancel, you will retain access to your prior year or previously paid Tax Software (prep files) in accordance with the terms of your Tax Software End User License Agreement, however, you will not receive any future software updates and you may incur Pay-Per-Return fees for prior years’ returns, and will lose the ability to network or Pay-Per-Return any new returns or to electronically file any returns as of January 1st immediately following the date of any such cancellation.

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[QUOTE AND MECHANISM TO ‘ACCEPT’ AGREEMENT ON FOLLOWING PAGES]

**Signature: {{Sig\_es\_:signer:signature}} Signature Date: {{Dte\_es\_:signer:date}}**

**Signer’s Email: {{Em\_es\_:signer:email}}**

**Title: {{\*Ttl\_es\_:signer:title}}**