



THE CRM DOCTORS™

Thursday, June 8, 2023

Dear Rebecca,

Thank you for your interest in becoming a part of the CRMD family. We are pleased to offer you partnership as a Salesforce and Pardot Consultant (Specialty Consultant Level II) with CRMD, Inc. ("CRMD"). Our business model and long-term success demands that we bring on experienced creative professionals who deliver results. We are excited to welcome you to our team.

Provided below, and within your Consulting Agreement, are the details of our conversations for your partnership with CRMD. Should you accept, your contract will take effect June 1st 2023. You will report to William DeVito for all Consultant-related activities.

SPECIALTY CONSULTANT II HOURS (PART-TIME)

At CRMD, our clients are always our primary focus. Thus, we'd like you to target at least 85% of your time on helping our clients (client-billable time vs. internal-billable time). Time spent outside of that would be for both team and personal development (i.e. furthering your Pardot education), as well as any internal projects available. **This role does not have any set hours expectations or hours goals**, so to our best predictions, we have an estimated 40 hours/month for you initially, but this is not capped.

PERFORMANCE INDICATORS (SPECIALTY CONSULTANT II PT)

Quarterly Consultant program performance minimums are as follows:

1. Over 85% of the clients you take a major role with continue to renew.
2. You continue to suggest new projects to customers that align with their needs/roadmaps
3. Maintain an environment to foster internal growth amongst your teammates.
4. All accounts where you are the main resource/point of contact on are healthy.
5. All accounts that are not healthy have a threat mitigation plan to try to get them healthy within a week.

TITLE

Your internal titles and role is that of Specialty Consultant II, but you may choose to represent your title outwardly in the following ways:

- Pardot Consultant
- Marketing Specialist

Please note, the CRMD leadership team is committed to helping you grow in this role – please leverage us to help in any way we can.

COMPENSATION – SPECIALTY CONSULTANT II

Your base compensation will be \$85.00/hour. You will be paid in accordance with our existing payroll policies for comparably situated contractors, subject to required or authorized withholding. Compensation will be subject to review and adjustment by the Company in its sole discretion.

FURTHER SPECIALTY CONSULTANT II PERFORMANCE EXPECTATIONS

1. Configure and deploy cloud solutions aligning to business needs and managing related projects. This includes:
 - a. Demonstrating solution-based self-sufficiency
 - b. Salesforce Configuration
 - c. Setting up and managing Third-Party Apps
 - d. Creating and maintaining Salesforce Reports and Dashboards
 - e. Proactively gathering requirements from the client
 - f. Performing extensive Quality Assurance (QA) checks
 - g. Ability to create documentation
 - h. Operating in a fast-paced environment, with aggressive deadlines.
2. Assisting with day-to-day business needs and enhancement requests.
3. Continually prioritizing and reprioritizing work with the clients, including utilizing their project management tool.
4. Delivering updates to clients and coordinating work with the development team.
5. Responsible for testing in conjunction with the CRMD team and seeing work out to completion.
6. Assisting with various internal projects or sales support activities.

BUSINESS EXPENSES

CRMD shall pay, or promptly reimburse you, for client, promotional and similar expenditures incurred by you that the Company determines are reasonably necessary for the performance of your duties and for which you submit appropriate receipts and information, so long as such expenditures

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are in accordance with Company policy.

OFF-HOURS WORK

You will be eligible to **receive 2x (two times) your hourly pay for Client-approved work during weekends and on holidays** designated by the Company as paid holidays. Up-to-date holiday policy is available on <https://crmd.io/holidays/>

OTHER DETAILS

Your partnership with CRMD is contingent upon our receiving acceptable results from your background check, partnership eligibility verification, favorable references, and execution of the enclosed Partnership Agreement which includes certain restrictive provisions. You may be required to periodically submit to testing for prohibited substances or credit checking, depending on client and/or Offer government requirements, and must agree to do so upon request. By acceptance of this offer, you affirm that you are not bound by any agreement or restriction that would prevent you from accepting partnership with or performing services for CRMD or its clients. CRMD reserves the right to modify or change the programs and benefits offered to consultants, at any time, at its sole discretion. This offer letter and your Partnership Agreement constitute the final agreement and understanding between the parties pertaining to your partnership with CRMD, and supersede all prior or contemporaneous agreements, whether verbal or written. All partnership at CRMD is at will and can be terminated by either party at any time without advance notice. Nothing in this letter is intended to suggest otherwise. This offer will expire if not accepted within two weeks from the date of this letter.

Rebecca, we are confident that you will enjoy your experience with CRMD and look forward to your contributions. Upon your review of this letter, I look forward to receiving signed copies indicating your acceptance of this offer of at-will partnership.

Kind Regards,
William DeVito
Founder & CEO

ACCEPTANCE

Company:

Authorized Signer: **Rebecca Scott**

Date:

Signature:

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CRMD, Inc.

Consulting Agreement

This Agreement is made as of _____, by and between CRMD, Inc., a Delaware corporation having its principal place of business at 155 Fleet St, Portsmouth, NH 03801 (the "Company"), and DMA Services, having its principal address at _____ ("Consultant"). In consideration of the covenants and agreements contained herein, Consultant and the Company hereby agree as follow:

1. Consulting Services.

(a) Services. During the term of this Agreement, Consultant shall perform the services described on Exhibit A hereto (the "Services") as requested by the Company. Consultant shall perform the Services in a professional manner in accordance with the highest prevailing standards in the industry. Consultant shall deliver to the Company such written reports of the Services performed hereunder as the Company may from time to time reasonably request. Consultant shall comply with all reasonable standards, rules, procedures and policies of Company which are disclosed to Consultant, including, without limitation rules and practices with respect to safety of persons and property, security and access to the premises of Company and its telephone and electronic mail facilities, and quality standards relating to software/cloud programs and documentation.

(b) Term; Termination. This Agreement shall commence as of the date signed unless sooner terminated as set forth herein. The Company may terminate this Agreement at any time upon fourteen (14) days' written notice to Consultant. Consultant may terminate this Agreement at any time upon fourteen (14) days' written notice to the Company. Notwithstanding the foregoing, the Company may terminate this Agreement immediately upon written notice to Consultant in the event Consultant breaches or threatens to breach any of his/her obligations under Sections 3 or 4. Upon the termination of this Agreement, the Company shall be obligated to pay only for Services actually rendered through the effective date of termination. Sections 1(d), 2, 3, 4, 5, and 6 shall survive the termination of this Agreement.

(c) Compensation. Consultant will invoice the Company for Services at the hourly rate set forth on Exhibit A and for the reasonable out-of-pocket travel and lodging expenses necessarily and actually incurred by Consultant in connection with the performance of Services in accordance with this Agreement; provided that any such out-of-pocket expenses (i) have been approved by the Company in advance in writing; (ii) have been detailed on an expense form acceptable to the Company and submitted to the Company for review and approval; and (iii) are supported by such documentation as the Company may reasonably request. Invoices will be submitted to the Company on a monthly basis (i.e., invoice should be received no later than the 20th of the month) and shall be payable no later than 30 days after submission. These invoices will include base compensation and expenses (with the appropriate receipts).

(d) Independent Contractor. Consultant shall perform all services as an independent contractor and not as an agent or employee of the Company. Except as specifically provided in Section 1(c), Consultant shall be responsible for all costs incurred by him in performing the Services. During the Term of this Agreement, Consultant may provide services to other people and entities, provided that Consultant honors the obligations and covenants in this Agreement. Consultant shall provide the necessary tools, equipment, and/or materials and shall determine the best manner in which to render the Services on the agreed schedule. This Agreement will not be deemed to create a partnership, joint enterprise or employment relationship between the parties. Consultant shall have no authority to contract for, obligate or bind the Company in any manner and shall not represent himself/herself to any third party as having any such authority. Consultant acknowledges that he/she is not entitled to participate in or receive any health or disability insurance, pension, retirement or other benefits of any nature (if any) to which an employee of Company may be entitled. The Company shall not be responsible to Consultant or any governing body for any social security, unemployment or other payroll-related taxes related to the performance of Services.

(e) Competitive Activities. Consultant shall promptly inform the Company of any potential conflict of interest situations or competitive consulting assignments.

2. Representations and Warranties; Indemnification.

(a) Representations and Warranties. Consultant represents and warrants that (i) Consultant has the full right to enter and perform his obligations under this Agreement; (ii) the performance by Consultant of Services under this Agreement does not, and shall not, breach any agreement that obligates him/her to keep in confidence any trade secrets or confidential or proprietary



information of any other party or to refrain from competing, directly or indirectly, with the business of any other party; (iii) Consultant shall not disclose to the Company any trade secret or other proprietary information of any third party; (iv) the Work Product (as defined in Section 3 below) will be the original work of the Consultant or in the public domain; and (v) the Work Product will not infringe the copyright, patent, trade secret or other proprietary rights of any third party.

(b) Indemnification. Consultant shall indemnify and hold the Company harmless from and against any loss, costs, expenses (including reasonable attorneys' fees) or damages incurred by the Company arising out of or in connection with any breach of the representations and warranties made by Consultant or any negligent or willful act or omission of Consultant in the performance of Services. Further, if any person or entity shall take or threaten proceedings against the Company alleging that use of the Work Product infringes a patent, copyright, trademark or other proprietary right, Consultant shall, at the request of the Company, defend such action at Consultant's sole expense, and shall pay all damages and costs relating to any such action incurred by the Company; provided that Consultant shall have control of the defense of any such action and all negotiations for its settlement or compromise.

3. Ownership of Work Product.

(a) Ownership. Consultant agrees that he/she shall not have any right, title or interest in or to any work produced or modified by Consultant pursuant to this Agreement or any development, improvement, idea, modification and invention conceived of or reduced to practice by Consultant, individually or in conjunction with other employees of the Company, which relate to the business of the Company and which are discovered, developed or worked on by Consultant in the course of performing Services under this Agreement, whether or not reduced to tangible form (collectively, the "Work Product"). Consultant agrees that all right, title and interest in and to the Work Product, and all patent, copyright, trade secret, trademark and other intellectual property rights therein, shall vest in the Company upon the creation thereof. Consultant specifically agrees that all original works of authorship generated or developed for the Company under this Agreement shall be considered "works made for hire" within the meaning and purview of Section 101 of the United States Copyright Act (17 U.S.C. sect. 101). To the extent that any such material, under applicable law, may not be considered "works made for hire", Consultant hereby irrevocably transfers, assigns and conveys to the Company the exclusive copyright ownership in such materials, without the necessity of any further consideration. In addition, if and to the extent Consultant may, under applicable law, be entitled to claim any ownership interest in the Work Product, Consultant hereby transfers, grants, conveys, assigns and relinquishes to the Company all right, title and interest in and to the Work Product, and all patent, copyright, trade secret, trademark and other intellectual property rights therein. Consultant hereby waives all claims to moral rights in any Work Product.

(b) Further Actions. At any time during or after the term of this Agreement, Consultant shall execute all papers or perform any other action which is reasonable and necessary to formally document the assignment to the Company of any interest which Consultant may have in Work Product, including, without limitation, such documents relating to the application, issuance and/or maintenance of any patent application under the patent laws of the United States or other country.

4. Confidentiality.

(a) Confidential Information. As used herein, "Confidential Information" means all technical, financial and business information describing or relating to the business of the Company or any of its current or prospective customers or suppliers (collectively, the "Companies"), which information is held in confidence by the Companies and is not generally known outside of the Companies, including, without limitation, proprietary, technical, development, marketing, sales, operation, and other business information, computer programs and systems, test designs, analytical models, client lists, marketing/business plans, financial data, know-how and all record-bearing media containing or disclosing such information and techniques which are disclosed pursuant to this Agreement. All Work Product shall be considered to be Confidential Information.

(b) Nondisclosure; Use. Consultant agrees that he shall not disclose the Confidential Information to any third party or use it for any purpose other than the provision of Services pursuant to this Agreement. Further, Consultant agrees that he shall not, without the prior written consent of the Company, copy, duplicate or otherwise reproduce any document or tangible item embodying or pertaining to any of the Confidential Information. Consultant's obligations under this Section shall not apply to any information that (i) is or becomes known to the general public under circumstances involving no breach by Consultant of the terms of this Section, (ii) is generally disclosed to third parties by the Company without restriction on such third parties, or (iii) is approved for release by written authorization of the Board of Directors of the Company. Upon termination of this Agreement or at any other time upon the Company's request, Consultant shall immediately return to the Company all materials in Consultant's possession reflecting or containing any Confidential Information and Consultant shall not retain any copies, extracts or other reproductions in whole or in part of any of the foregoing.



5. Non-Solicitation.

While the Consultant is employed by the Company and for a period of eighteen months after the termination or cessation of such engagement for any reason, the Consultant will not directly or indirectly:

5.1 Either alone or in association with others, solicit, divert or take away, or attempt to divert or take away, the business or patronage of any of the clients, customers, or business partners of the Company which were contacted, solicited, or served by the Company during the 18-month period prior to the termination or cessation of the Consultant's engagement with the Company; or

5.2 Either alone or in association with others (i) solicit, induce or attempt to induce, any employee, consultant or independent contractor of the Company to terminate his or her employment or other engagement with the Company, or (ii) hire, or recruit or attempt to hire, or engage or attempt to engage as an independent contractor or consultant, any person who was employed or otherwise engaged by the Company at any time during the term of the Consultant's employment with the Company; provided, that this clause (ii) shall not apply to the recruitment or hiring or other engagement of any individual whose employment or other engagement with the Company has been terminated for a period of six months or longer.

5.3 Extension. If the Consultant violates the provisions of any of the preceding paragraphs of this Section 1, the Consultant shall continue to be bound by the restrictions set forth in such paragraph until a period of one year has expired without any violation of such provisions.

6. Miscellaneous.

(a) Remedies. Consultant acknowledges that by reason of the fact that serious and irreparable harm would be sustained by the Company in the event of any breach by Consultant of the provisions of Sections 3, 4, or 5 of this Agreement, in addition to any other rights that the Company may otherwise have, the Company shall be entitled to apply to any court of competent jurisdiction and obtain specific performance and/or injunctive relief against Consultant, without making a showing that monetary damages would be inadequate and without the requirement of posting any bond or other security whatsoever, in order to enforce such provisions or prevent any such breach or threatened breach of such provisions.

(b) Notices. All notices required or permitted under this Agreement shall be in writing and shall be given in person, by nationally recognized commercial courier service, or by certified United States mail, postage and other fees prepaid, and addressed to the other party at the address set forth above, or such other address as either party may designate to the other in accordance with this Section. Notices shall be effective when received (or if delivery is refused, when delivery is attempted).

(c) Governing Law. This Agreement shall be governed by and construed in accordance with the internal laws of the Commonwealth of Massachusetts.

(d) Assignment. This Agreement shall be binding upon, and inure to the benefit of, both parties and their respective successors and assigns, including any corporation or other entity with which, or into which, the Company may be merged or which may succeed to its assets or business, provided, however, that the obligations of the Consultant are personal and shall not be assigned, delegated or subcontracted by him.

(e) Severability. If any provision of this Agreement is held invalid or unenforceable, Consultant agrees that such provision may be deleted and this Agreement shall be enforced as so modified.

(f) Entire Agreement; Amendment. This Agreement (together with its Exhibits) constitutes the entire agreement between the parties and supersedes all previous agreements and communications, whether oral or written, relating to the subject matter of this Agreement. This Agreement may only be modified by a written instrument signed by both parties.

(g) Waiver. The waiver by the Company of a breach of any provision of this Agreement by Consultant shall not be construed as a waiver of any succeeding breach of the same or any other provision, nor shall any delay or omission on the part of the Company to exercise any right under this Agreement operate as a waiver of that or any other right.

(h) Headings. The headings of the sections of this Agreement are for convenience of reference only and shall not be considered in construing this Agreement.



IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed as an instrument under seal as of the day and year first written above.

CRMD, Inc.	Consultant: Authorized Signer
Name: _____	Name: <u>Rebecca Scott</u>
Position: _____	Position: _____
Date: _____	Date: _____
Sign: _____	Sign: _____

EXHIBIT A

Description of Services.

1. Configure and deploy cloud solutions aligning to business needs and managing related projects. This includes:
 - a. Demonstrating solution-based self-sufficiency
 - b. Salesforce & Pardot Configuration
 - c. Setting up and managing Third-Party Apps
 - d. Creating and maintaining Salesforce Reports and Dashboards
 - e. Proactively gathering requirements from the client
 - f. Performing extensive Quality Assurance (QA) checks
 - g. Ability to create documentation
 - h. Operating in a fast-paced environment, with aggressive deadlines.
2. Assisting with day-to-day business needs and enhancement requests.
3. Continually prioritizing and reprioritizing work with the clients, including utilizing their project management tool.
4. Delivering updates to clients and coordinating work with the development team.
5. Responsible for testing in conjunction with the CRMD team and seeing work out to completion.

Rate of Compensation for Services.

- (a) No more than 80 hours/month shall be worked unless additional hours have been approved by the Company in advance in writing. All work will be paid at a rate of **\$85.00 per hour**.
- (b) Reasonable business expenses will be paid net-30 based on pre-approved and proper documentation.
- (c) Potential to take on more work as requested and/or available.
- (d) Potential for annual performance-based raise(s).
- (e) This position will report to **William DeVito**.

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
					-				

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or “doing business as” (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a “disregarded entity.” See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, “Business name/disregarded entity name.” If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.

You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

Certificate Of Completion

Envelope Id: F1F39FF02F434C53A7C002B0D60F5CFA

Status: Sent

Subject: Complete with DocuSign: Rebecca Scott - Partnership Agreement - 2023.pdf, CRMD and Rebecca Scot...

Source Envelope:

Document Pages: 12

Signatures: 0

Envelope Originator:

Certificate Pages: 5

Initials: 0

Will DeVito

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Enveloped Stamping: Enabled

Cornish, NH 03745

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will@crmdsolutions.com

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Rebecca Scott

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contact.rebecca.scott@gmail.com

Viewed: 6/8/2023 1:54:03 PM

Security Level: Email, Account Authentication
(None)**Electronic Record and Signature Disclosure:**

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ID: d112a97a-8cec-40ac-aaef-434e2b1a4959

William DeVito

will@crmdsolutions.com

Security Level: Email, Account Authentication
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Sarah Cavanaugh

sarah@crmd.io

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Witness Events**Signature****Timestamp****Notary Events****Signature****Timestamp****Envelope Summary Events****Status****Timestamps**

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Payment Events**Status****Timestamps**

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, Will DeVito (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

Getting paper copies

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after signing session and, if you elect to create a DocuSign signer account, you may access them for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of a DocuSign envelope instead of signing it. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures

electronically from us.

How to contact Will DeVito:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: will@crmdsolutions.com

To advise Will DeVito of your new e-mail address

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at will@crmdsolutions.com and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc. to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in the DocuSign system.

To request paper copies from Will DeVito

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to will@crmdsolutions.com and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

To withdraw your consent with Will DeVito

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to will@crmdsolutions.com and in the body of such request you must state your e-mail, full name, US Postal Address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

Required hardware and software

Operating Systems:	Windows® 2000, Windows® XP, Windows Vista®; Mac OS® X
Browsers:	Final release versions of Internet Explorer® 6.0 or above (Windows only); Mozilla Firefox 2.0 or above (Windows and Mac); Safari™ 3.0 or above (Mac only)
PDF Reader:	Acrobat® or similar software may be required to view and print PDF files
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	Allow per session cookies

** These minimum requirements are subject to change. If these requirements change, you will be asked to re-accept the disclosure. Pre-release (e.g. beta) versions of operating systems and browsers are not supported.

Acknowledging your access and consent to receive materials electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Will DeVito as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Will DeVito during the course of my relationship with you.