

# AccuTax Pro Service - Service Schedule 6

These terms pertain to the AccuTax Pro Service, provided by The Compliance Group (TCG). By accepting a service order for AccuTax Pro Service, the customer agrees to these terms alongside the general terms and conditions stated in the Master Service Agreement.

AccuTax Pro Service is an outsourced tax compliance service for communication providers, facilitated by TCG in collaboration with TaxConnex®. This service is personalized and offered by experienced tax experts assigned to each customer's account. It is designed for medium-to-large communication service providers that generate over \$50,000 monthly revenue from taxable communication services and operate in a minimum of three tax jurisdictions.

## Service Overview

In partnership with TaxConnex®, TCG delivers nationwide, state, and local communication taxes, digital goods & services transaction taxes, and 911/E911 Compliance & Reporting Services (Tax / 911 C&R Services).

The AccuTax Pro Service includes the following services:

- Preparation and submission of communication tax and 911 returns.
- Submission of taxes and 911 fees to the appropriate jurisdictions.
- Management of tax calendar and changes in filing frequency.
- Management of nexus thresholds.
- Handling of taxability rules and regulations.
- Management of notices.
- Support during audits.
- Assistance with tax exemption and resale certificates.

## Pricing Structure

The AccuTax Pro Service's pricing includes these services and, except as otherwise specifically provided in the Customer's proposal, agreement for services, or purchase order, also includes up to two hours per month of ad hoc support for:

- Addressing queries.
- Managing special projects.
- Assisting with new products/services/territories.
- Handling monthly or quarterly tax rate changes.

The services from TaxConnex® to the customer are transferred through a subcontractor arrangement. TaxConnex® doesn't incur additional charges unless authorized by the customer beforehand.

Customers are required to establish a dedicated escrow account for tax remittances.

## **Service Inclusions**

For a fixed monthly fee, AccuTax Pro Service provides:

- Maintenance and updates of the tax calendar.
- Mapping taxes to tax returns.
- Calculation of tax liability based on tax billed, accrued use tax, credits, and adjustments.
- Preparation and submission of tax returns and tax/911 fees according to state and local requirements.
- Secure storage of filed tax returns, confirmations, and payment records in the TaxConnex® proprietary database.
- Preparation of reports allocating tax liability to relevant GL accounts.
- Handling routine jurisdiction correspondence and inquiries.
- Assistance during jurisdictional audits and addressing general sales and use tax queries.

## **Service Exclusions**

The following are not covered by the monthly fixed fee:

- Reconciliation of sales tax data and accounts payable activities.
- General ledger activities (Customer handles corresponding entries based on reports provided).
- Sales tax registrations and renewals beyond the two hours per month of ad-hoc support.
- Property tax and income tax filings.
- Non-compliance remediation activities (Voluntary Disclosure Agreements and Amnesty).
- Sales tax consulting exceeding two hours per month.
- Management of sales tax exemption certificates.

## **About TaxConnex®**

TaxConnex® is a leading provider of professionally managed Tax / 911 compliance and consultative services. Through our partnership, we offer a comprehensive package of Regulatory, Corporate, Tax, and 911 compliance and consultative services. We utilize certified tax professionals and technology to deliver customized compliance services, resulting in accurate returns and improved engagement with clients. Clients benefit from resources, stability, clear tax data-to-returns connection, and enhanced accuracy.