

## **Tax Mapping & Integration Services by CCH® SureTax**

### **Terms and Conditions Applicable to The Compliance Group's Resale of CCH® SureTax Professional Services**

#### **Scope of Services**

Product Definition: For the purposes of these T&Cs, the term "Product" shall refer to CCH SureTax® (SureTax) tax engine software.

Services Provided: Upon engagement through The Compliance Group (TCG), SureTax shall deliver the following professional services to the Customer:

#### **Tier 1 Mapping Service:**

- Customer is required to provide a list of up to five (5) product and service categories for mapping to Product Trans Type codes, along with details for creating one (1) Product Bundle with setup for up to three (3) allocations.
- A remote meeting may be arranged to address any questions before performing the mapping service.
- Delivery includes mapping recommendations for up to five (5) categories and one (1) Product Bundle recommendation for up to three (3) allocations.

#### **Tier 2 Mapping Service:**

- Customer is required to provide a list of up to ten (10) product and service categories for mapping, along with details for creating two (2) Product Bundles, each with up to three (3) allocations.
- A remote meeting may be arranged for clarification before mapping.
- Delivery includes mapping recommendations for up to ten (10) categories and two (2) Product Bundle recommendations, each for up to three (3) allocations.

#### **Deliverables:**

- Mapping recommendations provided via an Excel document.
- Recommendations for Product Bundle(s) with specified allocations.

#### **Requirements and Assumptions**

- Services are provided remotely over a 12-month period from SOW execution date.
- Recommendations are provided by SureTax, with the Customer assuming all decision-making responsibilities.
- SureTax recommendations do not constitute legal advice and both SureTax and TCG expressly and explicitly disclaim that any attorney-client relationship is established through the provision of services to Customer; Customer is advised to seek the advice of qualified and competent counsel should Customer require legal affirmation in support of SureTax's recommendations.

- Customer is responsible for maintaining a suitable testing environment.
- Documentation and deliverables follow SureTax's template standards.
- Services are performed during standard hours (Monday-Friday, 8am-6pm CST).
- Extended Support Services outside standard hours are billed at \$350 per hour and must be requested 10 business days in advance.

### **Services Not Included**

Exclusions include modifications to the Product Web Services API, custom report creation, setup of tax returns and forms, extended support outside standard hours, tax business services, and tax research not specified in this SOW.

### **Resources & Delivery Schedule**

- The project is scheduled upon SOW execution, with kickoff dates arranged with the Customer.
- The SOW is effective upon Customer's signed and emailed receipt.
- Services are provided during standard operational hours.

### **Fees**

- **Tier 1 Mapping Service:** \$1,250 per service, plus applicable sales tax.
- **Tier 2 Mapping Service:** \$2,500 per service, plus applicable sales tax.
- Advance payment required.

### **Scope Changes**

- Changes to the scope, schedule, or budget will be discussed and documented via a signed change order.
- Email authorization is required for additional service requests exceeding ten (10) hours.

By engaging with The Compliance Group for the resale of CCH SureTax professional services, the Customer agrees to these terms and conditions.