MASTER AGREEMENT | 1 OF 7

Independent Tax Preparer Agreement

1099 Contractor, Software License, Compensation & Compliance Agreement

This Agreement is between **Ross & Associates MBSP LLC**, a Nevada limited liability company doing business as **Ross & Associates Tax Office** (Company), and the Contractor identified below. The completed Compensation Schedule, signed NDA, and acknowledged attachments form the agreement package. No live client work is authorized until final activation approval.

Contractor legal name

Team Member ID

Effective date

Tax season or service year

Term end date

Business name if applicable

State where services are performed

Contractor mailing address

Contractor notice email

Contractor phone

Company notice address - verify before execution

No office address established; contact Company by email.

Company notices: employment@rossandassociates-taxoffice.com | (725) 353-8293
Website: app.rossandassociates-taxoffice.com

1 Engagement and authorized services

Contractor may provide individual or business tax preparation, amendments, prior-year filings, consultations, e-file support, or related work only as identified in the completed scope below and accepted assignments. The parties agree on deliverables and deadlines. Contractor may decline offered assignments before acceptance. No minimum hours, assignments, income, or continuing engagement are promised.

Approved services and assignment limits

WORKPLACE ADDENDUM | OFFICE REMOTE OR HYBRID

Workplace duties and security plan

Approved workplace arrangement

Select arrangement

Approved office or remote work location and any agreed site requirements

Maintain a private work area, secure devices and records, approved system access and reliable secure connectivity. Use screen locks and MFA; prevent household or visitor access to client records. Report location changes for security and applicable-state review. No unrestricted home inspection or unpaid employee work is authorized.

Written information security plan acknowledgment

Company must provide its current written information security plan and role-specific procedures before live access. This agreement is not a substitute for the plan. Use approved encrypted systems, current security updates and restricted storage. Do not use personal email or unapproved cloud or AI services for taxpayer data. Secure paper records and dispose of them only through approved procedures, subject to retention and legal holds.

Company security plan version and date supplied

Approved equipment, connection and secure storage arrangements

Equipment and expense allocation - enter NONE if none

Security incident reporting contact and fallback

☐ I received the approved workplace and security instructions. I will protect records and promptly report suspected incidents. These terms preserve legally protected reporting and mandatory rights.

Contractor signature through authorized signing process **Date** **Time and zone**

Classification and software terms

2 Contractor relationship and eligibility

The parties intend independent contractor treatment only where supported by the actual relationship and applicable law. Contractor controls the manner and means of accepted work, subject to lawful security, professional standards, agreed deliverables, and client requirements. Contractor may perform other lawful work without misusing Company information. A 1099 label does not override worker-classification law or waive employee rights. A separate agreement and payroll process are required for an employee role.

Contractor is responsible for taxes properly attributable to contractor earnings, subject to lawful reporting or withholding. Before paid preparation requiring a PTIN, Contractor must maintain a current PTIN and any credentials or licenses required for the assigned work. Contractor must accurately describe qualifications and promptly disclose a credential lapse, restriction, or event materially affecting lawful performance; no blanket disclosure of unrelated personal matters is required.

3 Seasonal software access

The required seasonal contribution toward authorized software access is **$79 per tax season**; it is not a statement of the software full value or a professional credential. The contribution applies only to a lawful contractor software arrangement, not as a charge for obtaining employee work. The software access fee is **$79 per tax season** for the license period and included services entered below. Future seasons require a written offer and acceptance; no current-season increase, automatic renewal, or payment authorization is created. Any fee waiver or exception must be recorded in writing.

Access is limited, revocable for stated compliance or security reasons, nonexclusive, nontransferable, and nonsublicensable, solely for authorized Company assignments. Software and third-party rights remain with their owners. Do not share credentials, resell access, scrape, reverse engineer, bypass restrictions, or permit unapproved access. No independent EFIN right or separate office license is granted.

Software powered by R&A PRO-TAX SOFTWARE SOLUTIONS. That division operates through R&A Business Software Solutions LLC. This reference does not make that entity a party to this Agreement; any separate provider license requires its own applicable terms and authorized acceptance.

License start date

License end date

Included software, training and support - identify actual scope

Authorized license provider and payment recipient

Cancellation and refund terms - disclose before payment

Refund terms are a disclosed contract policy subject to applicable law; they are not represented as an IRS requirement. Support channels and hours must be specifically confirmed, and no 24/7 response commitment is implied.

Compensation tiers

4 Tier assignment and revenue share

The assigned tier, exact percentages, effective date, and payment schedule must be completed and accepted by both parties before work. **The accepted Contractor and Company shares must total 100%. Beginner filers receive 50% Contractor / 50% Company.** A tier is a compensation and review designation, not permission to bypass tax or security requirements.

The boxed catalog preserves the supplied tier percentages. Mason confirmed that the 50/50 tier applies to beginner filers. Mason H Ross Jr or Daisy Le Ross assigns the tier after interview, considering prior filing experience, verified PTIN status, training needs and review requirements. Prior experience does not bypass credential verification or final activation.

Tier	Contractor %	Company %	Review standard
Entry	70	30	Pre-file + mandatory review
Standard	60	40	Pre-file + heightened review
Beginner (Balanced)	50	50	Pre-file + beginner review
Advanced	60	40	Pre-file + risk review
Elite	80	20	Pre-file + audit review

Assigned tier - must match accepted shares

Select tier

Accepted contractor share %

Accepted company share %

Tier effective date

Every tier remains subject to the separate initial transmission restriction and required pre-release review. Changes in compensation apply prospectively only through a written amendment accepted by both parties. No retroactive reduction, forfeiture of earned compensation, or automatic tier loss is authorized. Company may increase review or temporarily restrict access for a documented compliance concern without changing earned compensation.

- [ ] I reviewed my assigned tier and confirm that the accepted shares match my assigned tier and total 100%, and no commercial term is left unresolved.

Payment and reconciliation schedule

5 Fee base and pricing

This is a commission-based contractor arrangement, not a salary, hourly wage, or guaranteed income. Contractor chooses whether to accept assignments and pursue the required learning. Contractor sets the preparation fee for accepted services, subject to law, ethical rules and clear client disclosure. Company receives its agreed tier percentage of preparation fees actually collected; Contractor receives the remaining agreed percentage. Separately itemized bank, transmitter and service bureau charges are additional to the preparation fee and excluded from the split. No refund-percentage or other prohibited pricing is permitted. Mandatory employee rights remain unaffected.

Commission base and additional agreed exclusions

Collected preparation fees only; separately itemized bank, transmitter and service bureau fees excluded.

Payout eligibility - actual receipt of preparation fees

Weekly after Company receives cleared preparation fees.

Payout frequency	Weekly cutoff / time zone	Weekly payout processing day
Weekly	Set before first funded payout	Set before first funded payout

Payment method and statement delivery - do not enter bank numbers

6 Fees refunds chargebacks and disputes

Pay weekly after cleared preparation-fee receipt. IRS acceptance is not funding; refund-based collections depend on IRS processing, bank release and remittance. Direct-paid fees follow actual receipt. No IRS refund or season-opening date is promised. Confirm the recurring processing day before the first funded payout. Apply only lawful adjustments accepted in writing. Statements must itemize collections, the split, adjustments and payment. Identify disputed amounts and supporting records promptly; undisputed earned amounts remain payable and legal rights are preserved.

Authorized fee allocation, refund and chargeback rules

Bonus or renewal waiver - formula, qualifying period, payout date; enter NONE if none

Statement review and dispute contact or time frame; no waiver of statutory deadlines

Final reconciliation timing after termination	Contractor payment schedule initials

FEE AND AUTHORITY SCHEDULE | INCORPORATED ADDENDUM

Separate fees and filing limits

Disclose this schedule before work or charges. Enter exact amounts or an identified current provider schedule and unit; use NONE or NOT APPLICABLE where appropriate. Blank entries authorize no charge. These fees are separate from the preparation fee and $79 seasonal software contribution.

Service bureau fee

Amount or exact schedule reference

Unit / product / when applicable

Provider / recipient

Who pays and collection method

Transmitter fee

Amount or exact schedule reference

Unit / product / when applicable

Provider / recipient

Who pays and collection method

Bank or refund-product fee

Amount or exact schedule reference

Unit / product / when applicable

Provider / recipient

Who pays and collection method

Disclose all applicable charges to the taxpayer before consent. Refund products are optional and require their own disclosures and authorizations. Do not represent a private fee as an IRS charge or require a bank product merely to obtain tax preparation. Do not deduct these pass-through charges a second time from the Contractor preparation-fee share. Any Contractor-paid charge requires specific advance written acceptance; fee changes apply only to later affected services after disclosure and acceptance.

Initial preparation-only period

Owner-selected minimum restricted period - no early transmission right

Select 2 or 3 seasons before activation

First restricted Company filing season

Assigned by Mason H Ross Jr or Daisy Le Ross

This 2-3 season restriction is Company policy, not a stated IRS waiting-period rule. If no period is selected, transmission remains disabled. Completing the period never grants automatic transmission authority. Any later permission requires documented owner approval, verified competence, required eligibility, access controls and compliance with the ERO process. No tier or credential overrides this restriction.

Contractor schedule initials

Date accepted

ROSS & ASSOCIATES®
TAX OFFICE
YOUR VIRTUAL/MOBILE TAX PREPARATION EXPERTS

FEE SCHEDULE | CLIENT COST SUMMARY

Explain the complete client charge

Complete for the specific client and selected services before consent. Use actual current provider amounts; enter $0 / N/A when a fee does not apply. This is a manual worksheet: verify every calculation.

Client / engagement reference

Quote date / tax year

1 Provider fees before tax preparation

Service bureau fee ($)

Provider / recipient and when applicable

Transmitter fee ($)

Provider / recipient and when applicable

Bank / optional refund-product fee ($)

Provider / recipient and when applicable

A. Provider-fee subtotal ($): sum of the three fees above

2 Preparation fee and final client total

B. Agreed tax preparation fee ($)

C. Total client charge ($): A + B

Who pays / collection method / timing

Client explanation / applicable optional product / quote notes

Explain each charge and its recipient. Refund products are optional and require the provider disclosures and authorizations. If the preparation quote already includes a listed fee, reconcile it before totaling so the client is not charged twice.

The contractor/company percentage split applies to the agreed preparation-fee base under the compensation schedule. Do not deduct provider fees a second time from the contractor share. The $79 seasonal software contribution is separate and is not automatically a client charge.

Professional duties and client security

7 Return review and EFIN authority

At every tier, Contractor may prepare and submit draft work internally for review but may not independently transmit, file, release or submit any Company client return, form or supporting document to a taxing agency, bank or other external recipient during the initial restricted period. Mason H Ross Jr, Daisy Le Ross, or an appropriately qualified Company-authorized tax professional must review the complete work and required supporting records, resolve identified issues and approve it before an authorized person submits it. Review does not replace the actual preparer identity, signature, PTIN or legal responsibilities.

E-file access is limited to authorized Company systems and the approved ERO process. A PTIN, training badge, or tier does not authorize use of an EFIN independently, another location, or another business. Obtain required taxpayer signatures and authorizations before transmission. Do not share an EFIN login, impersonate another preparer, or file without authority.

8 Professional compliance

Comply with applicable tax law, paid-preparer due diligence, required preparer disclosures, records requirements, and professional rules applicable to the actual services and credentials. Circular 230 applies where legally applicable. Do not fabricate income or expenses, conceal material facts, promise refund amounts or approval, or practice outside authorized credentials. Escalate uncertain tax issues and suspected fraud. Cooperate with lawful Company reviews and agency inquiries without surrendering protected reporting rights.

9 Company relationships and taxpayer rights

Company client lists, assignment records, brand, workflows, and business goodwill remain Company business assets to the extent lawfully owned. A client is not property; taxpayer rights to records, choice of provider, required copies, and lawful disclosures remain intact. Record any agreed pre-existing client relationships or exceptions below. Do not take Company records, divert assigned receipts, or misuse confidential information to move business outside the agreed engagement.

Pre-existing client relationships or agreed exceptions; enter NONE if none

During this relationship and for 2 years after it ends, Contractor must not use Company confidential information to actively solicit or divert Company clients or referral relationships for a competing business. This narrow restriction does not prohibit general advertising, lawful outside work, protected activity, independent contacts, or a client's voluntary choice without prohibited solicitation. No geographic or blanket noncompetition covenant is created. Mandatory law controls; restrictive language requires counsel review before use.

10 Security and information handling

The signed NDA and provided written information security instructions apply. Use only approved systems and assigned records, individual credentials and MFA. Do not export taxpayer data or retain copies in personal email, public storage, or unapproved AI tools. Follow applicable IRC section 7216 consent and use restrictions. An NDA is not taxpayer consent and cannot replace the Company security plan.

Service terms and Nevada provisions

11 Training and continuing readiness

Complete assigned Academy lessons, demos, practice exercises, and Company-required IRS Due Diligence training certificate submission before live access. The Company's minimum knowledge-check score is 80%, with instructor approval before awards. These are Company onboarding requirements; internal awards do not grant IRS credentials or approved CE credit. Training compensation, if any, must be stated below; nothing waives pay required by applicable employment law.

Training compensation or expense arrangements; enter NONE if none

12 Term suspension and termination

The stated term begins on the effective date, subject to activation. Either party may end future services by written notice. Company may immediately suspend access for a reasonable security, credential, fraud, or material compliance concern and may terminate for material breach. Contractor must cooperate in a secure handoff of accepted work, deadlines, and client records. Suspension or termination does not forfeit earned compensation; the payment schedule and mandatory law control final reconciliation. Confidentiality and lawful records duties survive.

13 Responsibility indemnity and remedies

Each party is responsible for its own negligence, willful misconduct, and material breach to the extent provided by law. For a third-party claim caused by such conduct, the responsible party will indemnify the other for reasonable, documented loss only to the extent caused by that conduct. The protected party must promptly notify the other, reasonably cooperate, and not impose an admission or settlement without consent. This does not transfer liability for the Company's own fault, impose automatic fines, or authorize a deduction from compensation. No prospective defense obligation or automatic attorney-fee shifting is created.

Available actual damages and lawful equitable relief remain subject to proof and court requirements. Neither party excludes liability or rights that cannot lawfully be excluded. No punitive contractual penalty, forced arbitration selected later by one party, or waiver of legally protected claims is included.

14 Nevada law notices and complete agreement

Nevada law governs except for controlling federal or other mandatory law, including law of a state where services are performed. Courts with lawful jurisdiction in Clark County, Nevada are the agreed venue where legally permitted; mandatory forum rules and protected agency proceedings remain available. Notices go to the parties' stated addresses or later written updates. The parties will try direct written resolution without delaying mandatory deadlines.

This Agreement, completed schedule, NDA, and accepted attachments supersede prior conflicting proposals on their subjects. Changes require written acceptance by both parties; routine security updates may be issued without changing compensation. No assignment or subcontractor access without prior written Company approval. Invalid terms are limited or severed only as law permits. Counterparts and electronic signatures may be used with agreement, intent, attribution, and accessible retained records.

MASTER AGREEMENT | 7 OF 7

Contractor terms and signatures

Read every page, the assigned tier, the completed payment schedule, the NDA, and all incorporated attachments before signing. You may ask questions and retain a complete copy. No payment, hiring decision, or system activation is performed by completing this PDF.

- [ ] I have read and understand the Agreement and the completed compensation schedule and have had the opportunity to ask questions.
- [ ] I understand the $79 seasonal software fee, the specific included services, the license period, and the disclosed refund and renewal terms.
- [ ] I understand the intended contractor relationship does not override legal classification or waive legally required protections.
- [ ] If I sign electronically, I agree to this electronic process and intend the signature I apply through the approved signing process to execute the completed Agreement.

Contractor

Printed legal name

Date signed

Time and zone

Signature - through authorized signing process

Company authorized representative

Ross & Associates MBSP LLC dba Ross & Associates Tax Office
Mason H Ross Jr - Owner, Founder, President & CEO
Daisy Le Ross - Co-Owner, Co-Founder, VP & CFO

Owner printed name

Mason H Ross Jr

Co-owner printed name

Daisy Le Ross





Mason date / time / zone

Daisy date / time / zone

Owner-authorized signature and stamp images are displayed as supplied. They are not a notarial seal or a digital certificate. Complete the commercial terms and retain the accepted version and contractor signing record before activation.

An optional notarial certificate may be attached if requested and lawfully completed by a commissioned notary. No notarization is represented as required for this agreement, and a notary acknowledgment does not replace informed acceptance or resolve classification.

SEPARATE CONFIDENTIALITY AGREEMENT | 1 OF 2

Confidentiality and Nondisclosure Agreement

Team member legal name

Team Member ID

NDA effective date

Role or approved services

This separate agreement is between the identified person and Ross & Associates MBSP LLC dba Ross & Associates Tax Office. In consideration of the parties' onboarding relationship and authorized access, the person accepts these duties. It does not itself establish classification, compensation, or a software fee.

1 Information and permitted use

Confidential information includes nonpublic client and prospect tax, identity, financial, bank and contact information; returns, supporting records and correspondence; credentials, security procedures, business methods, pricing and compensation schedules; training materials and answer keys; and information entrusted by others. It may be oral, written, visual, electronic or derived, marked confidential or reasonably understood as confidential. Use it only for assigned Company services or training and share it only with authorized persons who need it and have appropriate duties.

2 Protection and incident reporting

Use reasonable care, at least the care used for similar personal information, and follow the provided security plan and document instructions. Use approved systems and individual credentials with MFA; never share passwords, export client lists for outside use, or retain unauthorized copies. Subcontractor access requires prior written approval. Company approval does not replace legally required taxpayer consent. Report suspected loss, phishing, compromise or unauthorized disclosure immediately through the approved channel or directly to the assigning manager if unavailable; preserve evidence and cooperate with containment.

3 Exclusions and compelled disclosure

Information is excluded if demonstrably lawfully known without a duty, public without breach, independently developed without using confidential information, or lawfully received without restriction. Disclose information required by law or a valid legal process only as required, with prompt Company notice where legally permitted so protection may be sought. Protected reports need no notice or permission.

4 Protected reporting and trade secret immunity

Nothing prohibits legally protected reporting, government or attorney communications, participation in investigations, or protected discussions of pay or working conditions. Under 18 U.S.C. section 1833(b), an individual has federal and state trade-secret immunity for disclosure made in confidence to a government official or attorney solely to report or investigate a suspected legal violation, or in a complaint or other document filed under seal. In a retaliation action for reporting a suspected violation, the individual may disclose to counsel and use the information in court if filings containing it are sealed and other disclosure follows court order. Qualifying contractors and consultants are included.

SEPARATE CONFIDENTIALITY AGREEMENT | 2 OF 2

Confidentiality terms and execution

5 Ownership return and retention

No ownership or license is granted beyond necessary authorized access. Materials remain with their lawful owners. On request or when access or services end, return property and records, stop system use, and securely remove unauthorized copies under the person's control. Keep only records legally required for that purpose, protected and not reused; do not destroy evidence or records under preservation duties. Routine inaccessible backups remain protected until normal secure deletion. Required taxpayer copies and lawful reporting are not restricted.

6 Duration and enforcement

Duties cover information accessed during onboarding and services and continue while it remains confidential. Trade secrets remain protected while legally qualifying; personal tax information remains protected as required by law. Exclusions and protected reporting continue. Company may seek available legal or equitable remedies subject to proof and court requirements. No automatic penalty, fee shifting, noncompetition covenant or waiver of mandatory rights is created by this NDA.

7 Complete agreement on confidentiality

Nevada law governs subject to controlling federal or other mandatory law. Changes require both parties' written acceptance. Invalid terms are limited or severed only as permitted. This is the complete confidentiality agreement on its subject, without eliminating additional lawful security duties or statutory confidentiality requirements. Electronic execution requires agreement, intent, attribution, and retained accessible records. Compensation and software fees remain in the separate master agreement.

Acknowledgments and signatures

☐ I have read the confidentiality agreement, including exclusions and protected reporting rights, and accept its terms when I sign through the approved process.

Team member

Printed legal name

Date signed

Time and zone

Signature - through authorized signing process

Company

Printed legal name

Date signed

Time and zone

Representative title

Signature - through authorized signing process

ATTACHMENT A | DOCUMENT COLLECTION AND VERIFICATION

Contractor onboarding document review

Contractor legal name

Team Member ID

Collect required documents through a verified, restricted Company process. This page records status only; it is not Form W-9 and does not collect SSNs, bank numbers, an ID number, or taxpayer data. Do not email completed W-9 forms or identity images. A checked box is not proof of verification.

☐ Completed official Form W-9

Reviewer or applicable exception

Verified date or follow-up date

☐ Current PTIN verification

Reviewer or applicable exception

Verified date or follow-up date

☐ Government ID verification

Reviewer or applicable exception

Verified date or follow-up date

☐ Resume or professional summary

Reviewer or applicable exception

Verified date or follow-up date

☐ EFIN documentation if applicable

Reviewer or applicable exception

Verified date or follow-up date

☐ Company-required IRS Due Diligence certificate

Reviewer or applicable exception

Verified date or follow-up date

Official W-9: irs.gov/forms-pubs/about-form-w-9. Use the current IRS form and instructions. Do not rebrand or recreate its certification. If the person is not eligible to use W-9, obtain appropriate advice and the applicable form.

A consumer-report background screen, if used, requires a separate compliant process with any required disclosure, authorization, and notices. This packet does not authorize a background report or make a hiring determination.

ATTACHMENT B | SOFTWARE AND ACCESS ACKNOWLEDGMENT

Software access and fee acknowledgment

Contractor legal name

Team Member ID

This acknowledgment records access scope and any distinct software-fee authorization. It does not expand the license, supersede mandatory law, or permit an undisclosed deduction. Do not enter passwords or payment-card or bank details here.

Approved software and systems

Access start date

Access expiration or review date

Approved role and permission limits

Select one software fee payment arrangement

Not selected

Payment receipt or waiver reference - no payment credentials

Optional specific offset authorization

Optional and subject to law: an unchecked box grants no offset right. This is not an employee wage deduction or a bank, card, or recurring-debit authorization.

Exact total authorized - maximum $79

Number and amount of installments

Eligible payments and dates affected; no unspecified charges

- [ ] I specifically authorize only the completed software fee offset above from eligible contractor compensation, subject to law; no other offset is authorized.
- [ ] I will use individual credentials and MFA, protect client data, and not share access or use the Company EFIN independently.
- [ ] I received the license period, included services, fee and refund terms and understand that training access is separate from live client access.

Contractor signature through approved signing process

Date

Time and zone

Access approved by

Approval date

ATTACHMENT C | TRAINING READINESS AND ACTIVATION

Training and activation checklist

Contractor legal name

Team Member ID

Interview approval permits onboarding only. Limited training access may follow completed agreements and verified onboarding documents. Live software, assigned client records, and transmission access require the final authorized approval below. Training records remain separate from instructor answer keys.

- [ ] Interview completed and approval to begin onboarding recorded.
- [ ] Attachment A and required document verification completed.
- [ ] Master agreement, compensation schedule and NDA executed with a retained copy.
- [ ] Software fee arrangement and access acknowledgment completed.
- [ ] Assigned Academy videos and documents completed.
- [ ] Demo software walkthrough and required practice exercises completed using sample data.
- [ ] Company-required IRS Due Diligence certificate verified.
- [ ] Required knowledge checks passed at 80% or above; instructor review recorded.
- [ ] Security plan, client-document handling and incident reporting instructions acknowledged.
- [ ] Payout rules, statement process and support contacts explained.

Recorded score or assessment reference

Instructor reviewer and date

Missing items or corrective work - leave no unresolved item at activation

Final authorized reviewer

Approved activation date

Permissions actually released; record external system confirmation

Do not treat a training badge or checked checklist alone as approval to file returns. The approved reviewer must confirm credentials, completed agreements and readiness in the CRM. Employee roles require separate payroll and employment onboarding.

ATTACHMENT D | WORKING PROCEDURES AND RENEWAL

Support security and annual renewal

Support and escalation

Use approved Company support channels for general questions. Pause uncertain client-specific tax work and seek guidance. Escalate fraud indicators, credential misuse, IRS notices, missed deadlines, and data incidents promptly. Preserve evidence and do not conceal problems. Only persons with appropriate authority may speak for the Company or represent a client. Nothing prohibits protected reporting, truthful legally required responses, lawful personal representation, or meeting a legal deadline.

Routine approved support channel

Confirmed support hours and time zone

Urgent security or compliance contact and fallback phone

Records and offboarding

Record agreements, accepted versions, consents, document verification, training, approvals and access changes in restricted records. Retain according to a documented lawful schedule and legal holds, not an unlimited public or unrestricted archive. Stop access when no longer authorized; transfer open work, deadlines and records securely. Do not delete records subject to retention or legal preservation, and do not retain unauthorized personal copies.

Annual renewal

Before a new season, verify contact details, current PTIN and applicable credentials, updated ID if changed or expired, assigned training and certificate requirements, the offered software license, and the written compensation schedule. Review outstanding compliance matters before renewal. New fees, tier changes or commercial terms require prospective written acceptance. Nonrenewal does not waive confidentiality or properly earned compensation.

Annual renewal window

Renewal deadline

Record retention policy reference and responsible administrator

☐ I received the working procedures, support instructions and renewal requirements. I understand that they do not replace the signed compensation terms or waive legal rights.

Contractor signature through approved signing process

Date