

The Automated Tax Office Manager 2026-2027 License Agreement

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Lansing, MI 48917 (517) 940-8745

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REFUND POLICY

We want you to be completely satisfied with our software. If you are not satisfied within the first 60 days of purchase, we will provide a 100% refund of the software subscription fee. This refund applies only to the first licensed year and does not include the \$500 setup fee, which is non-refundable under all circumstances. A \$25 late fee will be assessed for accounts that are 7 days past due. Accounts that remain unpaid for two months will have software access suspended and will be subject to a \$50 reconnection fee. Accounts that are three months past due may be permanently canceled, at which time all client data, including backups, will be permanently deleted.

CANCELLATION POLICY

In the event the User would like to cancel their license agreement, they must fill out the cancellation form. All clients with Monthly Installation Payment contracts will continue to incur monthly fees and automatic withdrawals until said User notifies us of their intent to cancel by returning the signed cancellation form.

DATA IMPORT POLICY

Upon purchase, Automated Tax Office Manager will import the new User’s current-year client data into their Software at no additional fee. If the User would like prior-year data imported to their Software as well, there is a \$100 fee per year.

CLIENT DATA SECURITY

All communications between your computers and our servers are secured with 256-bit Secure Sockets Layer (SSL) encryption. We use GlobalSign SSL Certificate for the most secure option for SSL with the highest authentication and the strongest encryption. We host our servers on a Private Cloud network at Liquid Web, a SSAE-16 Type audited secure data center located in Lansing, MI. All uploaded documents are stored redundantly with Amazon S3 across three availability zones. Automated Tax Office Manager will not give, sell or use your customer client data to any outside company for its use in marketing or solicitation. In addition, Automated Tax Office Manager will not market or solicit your company’s clients.

LIMITED WARRANTY

The performance of the Software varies with various manufacturers’ equipment with which it is used. Automated Tax Office Manager does not warrant the level of performance of the Software or that earlier versions superseded by new versions will continue to perform at the same level with the User’s equipment. Automated Tax Office Manager does not warrant that the Software or the functions contained in the Software will meet User’s requirements, operate without interruption or be error free.

LIMITATION OF LIABILITY

In no event will Automated Tax Office Manager be liable for any lost profits or other damages, including direct, indirect, incidental, special, consequential or any other type of damages, arising out of this Agreement or the use of the Software licensed hereunder, even if Automated Tax Office Manager has been advised of the possibility of such damages. With the sole exception of such damages equal to the software fee received from the User.

GENERAL PROVISIONS

Term and Termination. This Agreement and User’s subscription to the Software may be terminated (i) by User by giving Automated Tax Office Manager written notice of termination, (ii) by Automated Tax Office Manager, at its option, if User commits a material breach of the agreement, or (iii) upon termination of the Automated Tax Office Manager User Agreement, if any. Upon any termination of this Agreement, (i) User must cease all use of the Software,

(ii) User must take such other actions as Automated Tax Office Manager may reasonably request to ensure that the User has stopped using the software and (iii) This Agreement, together with any applicable Automated Tax Office Manager user Agreement embodies the entire understanding between the parties with respect to, and supersedes any prior understanding or agreement, oral or written, relating to the Software.

GOVERNING LAW

This Agreement will be governed by and construed under the laws of the state of Michigan, U.S.A.

GENERAL PROVISIONS

Neither this Agreement nor any part or portion hereof may be assigned, sub-licensed or otherwise Transferred by user. Should any provision of this Agreement be held to be void, invalid, unenforceable or illegal by a court, the validity and enforceability of the other provisions will not be affected thereby. Failure of a party to enforce any provision of the Agreement does not constitute and should not be construed as a waiver of such provision or of the right to enforce such provision. Export Laws. The Software, the Software technology and its related documentation may not be exported or re-exported in violation of the U.S. Export Administration Act and its implementing regulations.