

2018 Intuit Firm of the Future Contest Official Rules

1. Eligibility: 2018 Intuit Firm of the Future Contest (the "Contest") is open only to bookkeeping, full-service accounting and/or tax firms ("Firm") that are located in and primarily operate in one or more of the following five (5) jurisdictions: the fifty (50) United States and the District of Columbia, Australia, Canada (excluding Quebec), India, and the United Kingdom (each a "Location"). An authorized representative ("Representative") of the Firm who is at least eighteen (18) years old (or the age of majority in his/her place of residence) may register on behalf of the Firm and submit the entry materials on behalf of the Firm.

Firms selected as Country Finalists in this contest (in 2016 and 2017) and the firm winning the Grand Prize in 2015 are not eligible to participate. Firms that include employees of Intuit Inc., HelloWorld, Inc., and any of their parent and affiliate companies as well as the immediate family (spouse, parents, siblings and children) and household members of each such employee are not eligible. The Contest is subject to all applicable laws and regulations and is void in Quebec and where prohibited.

2. Sponsor: Intuit Inc., 2535 Garcia Avenue, Mountain View, CA 94043, U.S.A. **Administrator:** HelloWorld, Inc., 3000 Town Center, Floor 21, Southfield, MI 48075, U.S.A.

3. Agreement to Official Rules: Participation in this Contest constitutes Firm's full and unconditional agreement to these Official Rules. Sponsor's and Administrator's decisions are final and binding in all matters related to this Contest. Winning a prize is contingent upon fulfilling all requirements set forth herein.

4. Timing: The Contest begins on 20 June 2018 at 12:00 a.m. United States Eastern Time ("ET"), ends on 31 October 2018 at 11:59 p.m. ET (the "Contest Period") and consists of the following phases as set forth in the chart below:

Phase	Starts at 12:00 a.m. ET	Ends at 11:59 p.m. ET
Initial Submission	20 June 2018	12 August 2018
Judging	13 August 2018	25 August 2018
Public Voting	16 October 2018	31 October 2018

Administrator's computer is the official time-keeping device for the Contest. *Please see [world clock](#) for time zone conversion information.*

5. How to Enter: During the Initial Submission Phase, visit <https://intuit.me/FOTF2018> and follow the links and instructions to complete and submit the registration form, including name and email address of the Representative, Firm's name, and your Firm Location.

Next, provide responses (each no longer than 200 words) to the following questions that demonstrate how your Firm is a "Firm of the Future":

- 1) How many small business clients do you serve for accounting, bookkeeping and/or tax needs?
- 2) What percentage of your small business clients use QuickBooks Online?
- 3) Explain how you save time for your firm and your clients by leveraging cloud-based accounting technologies, including QuickBooks Online, QuickBooks Online Accountant and any third party applications.
- 4) Describe what advisory services you perform on behalf of your clients to help them avoid pitfalls and identify growth opportunities. Please include how technology and the products you use play a role in your ability to deliver these services.
- 5) Tell us how your firm is leveraging the Web, digital marketing and social media to interact with clients, reach new prospects and grow.

- 6) Share a story of how you have leveraged cloud-based accounting technologies (including QuickBooks Online, QuickBooks Online Accountant and/or any third party applications) to help a specific client prosper and achieve success. **NOTE:** You will be required to confirm approval with the client that you identify.

Then upload one (1) photo (collages including multiple images are permitted) that best exemplifies your Firm's future-forward business lifestyle and how it is a "Firm of the Future." Your responses to all questions and photo will be collectively referred to as your submission ("Submission"). By uploading your Submission, you agree that it conforms to the guidelines, permissions, and content restrictions below. If your Submission complies, you will be entered into the Contest and Sponsor will publish each Firm's photo on the public gallery.

6. Submission Guidelines, Permissions and Content Restrictions:

Guidelines:

- Each written response must be in English and may not exceed 200 words; and
- The photo must be in .jpg and may be from 3 -10 MB.

Permissions: Firm must have permission from any recognizable individuals who appear in the Submission to use their names and likenesses in the Submission and to grant the rights set forth herein. Minors should not be included in the photo. If requested, Firm must be able to provide such permissions or proof in a form acceptable to Sponsor.

Content Restrictions:

- The Submission must not contain material that violates or infringes another's rights, including but not limited to privacy, publicity or intellectual property rights, or that constitutes copyright infringement; nonetheless, Submission may contain Sponsor's brand name and logos as well as the brand names and logos of any of the entities that have created QuickBooks Apps listed here: <https://apps.intuit.com>, or the brand names and logos of the following companies: Amazon, Apple, Google, Microsoft, Facebook;
- The Submission must be the original work of the authorized Firm;
- The Submission must not disparage Sponsor or any other person or party;
- The Submission must not contain material that is inappropriate, offensive, indecent, obscene, tortious, defamatory, slanderous or libelous;
- The Submission must not contain material that promotes bigotry, racism, hatred or harm against any group or individual or promotes discrimination based on race, gender, religion, nationality, disability, sexual orientation, or age; and
- The Submission must not contain material that is unlawful, in violation of, or contrary to the laws or regulations in the jurisdiction where Submission is created.

Limit: Each Firm may upload one (1) Submission during the Initial Submission Phase. Submissions received from any person or email address in excess of the stated limit will be void. Submissions generated by script, macro or other automated means are void. In the event of a dispute as to any Submission, the authorized account holder of the email address used to register will be deemed to be the Representative of the Firm and must comply with these Official Rules. The "authorized account holder" is the natural person assigned an email address by an Internet access provider, online service provider or other organization responsible for assigning email addresses for the domain associated with the submitted address. Each Firm may be required to show proof of being an authorized account holder. Released Parties (as defined in Section 12, below) are not responsible for lost, late, stolen, damaged, incomplete, invalid, un-intelligible, garbled, delayed, or misdirected Submissions, all of which will be void.

7. Sponsor's Use of Submissions: Uploading a Submission constitutes Firm's consent to give Sponsor a royalty-free, irrevocable, perpetual, non-exclusive license to use, reproduce, modify, publish, create derivative works from, and display such submissions in whole or in part, on a worldwide basis, and to incorporate it into other works, in any form, media or technology now known or later developed, including for promotional or marketing purposes. If requested, Firm will cause to have executed any documentation that

may be required for Sponsor or its designees to make use of the non-exclusive rights Firm is granting to use the Submission.

8. Judging of Initial Submissions: There will be one (1) finalist selected from each of the five (5) Locations (“Finalist”); there will be ten (10) Runner Ups selected from all entries without regard to Firm Location. After the Initial Submission Phase, a panel of qualified judges determined by Sponsor in its sole discretion will determine Finalists and Runner Ups. The judges will score each Firm based on its Submission using the following Judging Criteria:

- Submission demonstrates Firm’s transformation from a traditional Bookkeeping, Full-Service Accounting and/or Tax Firm into a “Firm of Future” as described at www.firmofthefuture.com (25%);
- Submission demonstrates that Firm is a “Trusted Advisor” for its clients as described at www.firmofthefuture.com (25%);
- Creativity of the Submission (25%); and
- Submission conveys the uniqueness of the challenge(s) solved and/or the successes achieved to help power prosperity for a specific client using cloud-based accounting technologies (including QuickBooks Online, QuickBooks Online Accountant and/or any third party applications) (25%)

The five (5) Finalists will be the Firms with the highest scoring Submission from each Location. The ten (10) Runner Ups will be those Firms with the next highest scores (regardless of the Location where the Firm is located). In the event of a tie, the Firm whose Submission received the highest score for Submission demonstrates Firm’s transformation from a traditional Bookkeeping, Full-Service Accounting and/or Tax Firm into a “Firm of the Future”, as determined by the qualified judges in their sole discretion, will be deemed the Finalist or applicable Runner Up from among the tied Firms. Sponsor reserves the right to select fewer than five (5) Finalists and ten (10) Runner Ups, if it does not receive a sufficient number of eligible and qualified Submissions. Sponsor will not disclose judging scores.

9. Finalist Requirements: After the Judging Phase on or around August 28, 2018, Finalists will be notified and required to formally accept the Finalist prize (as described in Section 14) as well as confirm its commitment to work with Sponsor to create a Finalist Video. Once confirmed as a Finalist, Sponsor will meet with each Finalist to provide information about the video creation process and confirm filming dates (video production will take place between 26 August - 9 October 2018), the specific date will be designated by Sponsor. Each Finalist Firm will be responsible for creating the script and a general plan for filming. The final video produced should explain why the Finalist is a Global Firm of the Future, and it should incorporate the Small Business that nominated by Finalist in their initial Submission. Sponsor will provide a film crew and producer for one day of filming on a date determined by Sponsor. Sponsor will edit the film. However, each Finalist and the Small Business it nominated will have the opportunity for one edit with production team (within a 48-hour timeframe) to provide feedback on the tone of the video, including music selection. Sponsor will own the final videos created. Each Finalist agrees and acknowledges that Sponsor may use the final videos for any purpose, but shall not be obligated to use them and shall have the right to refrain from using the video or Initial Submission. Sponsor shall not incur any liability whatsoever to the extent Sponsor chooses to refrain from any exploitation of its rights hereunder. Each Finalist will indemnify Sponsor, Released Parties, and any licensee of Sponsor against all claims, damages, liabilities, and expenses (including reasonable counsel fees and legal expenses) arising out of any breach of these terms.

10. Public Voting Phase: During the Voting Phase, each Finalist’s video will be posted in an online gallery for public voting at <https://intuit.me/FOTF2018>. The public will be permitted to vote for the Finalist’s video that they like best. Individuals will be required to register the first time they vote and will only be permitted to vote one (1) time per day during the Voting Phase. Multiple votes received from any person or email address in excess of the stated number will be void. Any attempt by any Finalist or voter to obtain votes by any fraudulent or inappropriate means, including without limitation, offering prizes or other inducements to members of the public as determined by Sponsor in its sole discretion, by using any automated program, by using multiple/different email addresses, identities, registrations and logins, or any other methods, will void those votes for the Finalist’s Submission and Finalist may be disqualified as determined by Sponsor in its sole discretion. The public vote tallies will be used to determine the Public Appeal score for each Finalist included in the Final Judging Criteria described below. Finalists who receive a higher number of votes will

receive a higher Public Appeal score. Sponsor reserves the right to not consider the score for Public Appeal for purposes of determining the Grand Prize winner should the voting appear to have been tampered with or manipulated in any way such that adjustments to the Public Appeal score does not fairly and adequately address the manipulation/tampering of votes.

11. Donation Opportunity During the Voting Phase: Sponsor will make a \$5 USD donation to Kiva.org (up to \$25,000 USD) for the following actions:

- (a) each valid vote completed during the Voting Phase;
- (b) each time a participant shares this promotion by clicking on the Twitter or LinkedIn icon buttons at the bottom of the promotional website; and
- (c) each time a person registers for this Contest during the Voting Phase from a unique link included in Facebook shared content. (To share on Facebook, click on the Facebook icon button located at the bottom of the promotional website).

12. Grand Prize Winner Determination: After the completion of the Voting Phase, a panel of judges will review each Finalist's Initial Submission and the Public Appeal Score based on the following criteria:

- Score for Initial Submission (85%); and
- Public Appeal Score (15%).

Subject to the Finalist's compliance with these Official Rules, the Finalist who receives the highest score will be deemed the potential Grand Prize winner. In the event of a tie, the Firm whose Submission received the highest score for its Initial Submission, as determined by the qualified judges in their sole discretion, will be deemed the potential winner from amongst the tied Finalists.

13. Prize Acceptance Requirements for all Winners: Potential Finalist and Runner Up Firms will be notified by email on or around 26 August 2018. Firm will be required to sign and return a Declaration of Compliance, Liability Waiver and, where not prohibited, a Publicity Release ("Declaration"), which must be received by Administrator within four (4) days of the date notice or attempted notice is sent, in order to claim his/her prize. If a potential winner cannot be contacted, fails to execute and return the Declaration or provide any other requested information within the required time period, does not comply with these Official Rules, or if prize is returned as undeliverable, potential winner forfeits the prize. If a potential winner is disqualified for any reason, the prize may be awarded to an alternate Firm who has received the next highest number of valid votes, in Sponsor's sole discretion. Grand Prize winner will also be required to sign and return an additional Declaration to formally accept the Grand Prize.

14. Prize for Small Business Identified by Finalists, Grand Prize Winner and Runner-Ups: The Small Businesses that are identified by entrants in their initial Submission will also be offered a prize if the entrant is selected as a winner and accepts the prize. The prizes offered are described in Section 14. Each Small Business who is offered a prize will be required to complete Declarations (as described above in Section 12).

15. Prizes: ONE (1) GRAND PRIZE: \$25,000 USD (or approximately £18,200, \$32,200 CAD, \$33,160 AUD or 1,662,300 INR) fulfilled as a check.

SMALL BUSINESS PRIZE: The Small Business identified by the Grand Prize winner will be offered a check for \$15,000 USD (approximately £10, 900, \$19,300 CAD, \$19,900AUD, or 997,000 INR)

FIVE (5) FINALIST PRIZES (one awarded to a Finalist in each Country): A trip for one (1) employee of the winning Firm to San Jose, California to attend 2018 QuickBooks Connect (November 5-7, 2018) and a \$5,000 USD cash prize (or approximately £3640, \$6,435 CAD, \$6,630 AUD or 332,450 INR) fulfilled as check. Trip package includes round trip, coach-class air transportation for one (1) from a major airport near winner's home (determined by Sponsor in its sole discretion) to an airport that services San Jose, CA; four (4) nights' accommodations at a hotel determined by Sponsor in its sole discretion (single room, double occupancy); round Trip Airport/Hotel Transfers; one (1) badge for Quick Book Connect. Winner must travel around the dates of QuickBooks Connect or prize will be forfeited. Trip must be booked at least twenty-one (21) days prior to departure. Travel and accommodations are subject to availability. Finalist must accept the trip prize to receive the cash prize. Approximate Retail Value ("ARV") for the Finalist from the US:

\$6,349 USD; for the Finalist from the United Kingdom: £5,420; for the Finalist from Canada: \$8,235 CAD; for the Finalist from Australia: \$11,154 AUD, and for the Finalist from India: 597,550 INR.

SMALL BUSINESS PRIZE: One member of the each Small Business identified by each Finalist will be offered a trip to San Jose, CA to attend Quick Books Connect (November 5-7, 2018) and a \$5,000 USD cash prize (or approximately £3640, \$6,435 CAD, \$6,630 AUD or 332,450 INR) fulfilled as check. Trip package includes round trip, coach-class air transportation for one (1) from a major airport near winner's home (determined by Sponsor in its sole discretion) to an airport that services San Jose, CA; four (4) nights' accommodations at a hotel determined by Sponsor in its sole discretion (single room, double occupancy); round Trip Airport/Hotel Transfers; one (1) badge for Quick Book Connect. Winner must travel around the dates of QuickBooks Connect or prize will be forfeited. Trip must be booked at least twenty-one (21) days prior to departure. Travel and accommodations are subject to availability. ARV for the Small Business from the US: \$6,349 USD; for the Small Business from the United Kingdom: £5,420; for the Small Business from Canada: \$8,235CAD; for the Small Business from Australia: \$11,154 AUD, and for the Small Business from India:597,550 INR. Small Business must accept the trip prize to receive the cash prize.

For All Travel Prizes: Travel must be round trip. Sponsor will determine airline and flight itinerary in its sole discretion. No refund or compensation will be made in the event of the cancellation or delay of any flight. Travel is subject to the terms and conditions set forth in this Contest, and those set forth by the Sponsor's airline carrier of choice as detailed in the passenger ticket contract. All expenses and incidental travel costs not expressly stated in the package description above, including but not limited to, ground transportation, meals, incidentals, gratuities, passenger tariffs or duties, airline fees, surcharges, airport fees, service charges or facility charges, personal charges at lodging, security fees, taxes or other expenses are the responsibility solely of winner. Travelers must be the age of majority in their Country of residence as of the date of departure and must travel on same itinerary. Travelers are solely responsible for obtaining valid passports and any other documents necessary for international travel, as applicable. Travel restrictions, conditions and limitations may apply. If in the judgment of Sponsor air travel is not required due to Firm's or Small Business proximity to prize location, ground transportation will be substituted for round trip air travel at Sponsor's sole discretion. Sponsor will not replace any lost, mutilated, or stolen tickets, travel vouchers or certificates. Actual value may vary based on currency exchange rate fluctuations, airfare fluctuations, and distance between departure and destination. Winner will not receive difference between actual and approximate retail value.

TEN (10) RUNNER UP PRIZES: \$2,500 USD fulfilled as a check (or approximately £1,820, \$3,220 CAD, \$3,315 AUD, or 166,220 INR).

Small Business Prize: \$1,000 USD fulfilled as a check (£730, \$1,290 CAD, \$1,326AUD, or 66,480 INR).

Prizes are non-transferable and no substitution will be made except as provided herein at the Sponsor's sole discretion. Sponsor reserves the right to substitute a prize (or a component thereof) for one of equal or greater value if the designated prize should become unavailable for any reason. Winners are responsible for all taxes and fees associated with prize receipt and/or use. **Limit:** One (1) Finalist Prize or one Runner Up Prize per Firm. Other than the trip prizes, all other prizes will be fulfilled 8 – 10 weeks after the end of the Contest.

15. Release: By receipt of any prize, each winner agrees to release and hold harmless the Sponsor, all entities who have approved "Apps" in the Intuit QuickBooks App Store, Administrator, and their respective parent companies, subsidiaries, affiliates, suppliers, distributors, advertising/promotion agencies, and prize suppliers, and each of their respective parent companies and each such company's officers, directors, employees and agents (collectively, the "Released Parties") from and against any claim or cause of action, including, but not limited to, personal injury, death, or damage to or loss of property, arising out of participation in the Contest or receipt or use or misuse of any prize, including any related travel.

16. Publicity Acceptance of any prize shall constitute and signify each Firm's or Small Business' agreement and consent that Sponsor and its designees may use the Firm's name, city, state or Province, Submission, Finalist Video, and/or prize information in connection with the Contest for promotional,

advertising or other purposes, worldwide, in any and all media now known or hereafter devised, including the Internet, without limitation and without further payment, notification, permission or other consideration, except where prohibited by law.

17. General Conditions: Sponsor reserves the right to cancel, suspend and/or modify the Contest, or any part of it, if any fraud, technical failures, human error or any other factor impairs the integrity or proper functioning of the Contest, as determined by Sponsor in its sole discretion. If terminated, Sponsor may, in its sole discretion, determine the winners from among all non-suspect, eligible Submissions received up to time of such action using the judging procedure outlined above. Sponsor, in its sole discretion, reserves the right to disqualify any individual it finds to be tampering with the Submission process or the operation of the Contest or to be acting in violation of the Official Rules of this or any other promotion or in an unsportsmanlike or disruptive manner and void all associated Submissions. Any attempt by any person to deliberately undermine the legitimate operation of the Contest may be a violation of criminal and civil law, and, should such an attempt be made, Sponsor reserves the right to seek damages and other remedies (including attorneys' fees) from any such person to the fullest extent permitted by law. Sponsor's failure to enforce any term of these Official Rules shall not constitute a waiver of that provision.

18. Limitations of Liability: Released Parties are not responsible for: (1) any incorrect or inaccurate information, whether caused by Firm, printing, typographical or other errors or by any of the equipment or programming associated with or utilized in the Contest; (2) technical failures of any kind, including, but not limited to malfunctions, interruptions, or disconnections in phone lines or network hardware or software; (3) unauthorized human intervention in any part of the Submission process or the Contest; (4) printing, typographical, technical, computer, network or human error which may occur in the administration of the Contest, the uploading, the processing or judging of Submissions or votes or the tabulating of votes, the announcement of the prizes or in any Contest-related materials; (5) late, lost, undeliverable, damaged or stolen mail; or (6) any injury or damage to persons or property which may be caused, directly or indirectly, in whole or in part, from Firm's participation in the Contest or receipt or use or misuse of any prize (including any travel/activity related thereto). Released Parties are not responsible for misdirected or undeliverable Submissions or for any technical problems, malfunctions of computer systems, servers, providers, hardware/software, lost or unavailable network connections or failed, incomplete, garbled or delayed computer transmission or any combination thereof. Released Parties are not responsible for any unauthorized third-party use of any Submission.

19. Disputes: Except where prohibited, each Firm agrees that: (1) any and all disputes, claims and causes of action arising out of or connected with this Contest or any prize awarded shall be resolved individually, without resort to any form of class action, and exclusively by the United States District Court for the Eastern District of Michigan (Southern Division) or the appropriate Michigan State Court located in Oakland County, Michigan; (2) any and all claims, judgments and awards shall be limited to actual out-of-pocket costs incurred, including costs associated with entering this Contest, but in no event attorneys' fees; and (3) under no circumstances will Firm be permitted to obtain awards for, and Firm hereby waives all rights to claim, indirect, punitive, incidental and consequential damages and any other damages, other than for actual out-of-pocket expenses, and any and all rights to have damages multiplied or otherwise increased. All issues and questions concerning the construction, validity, interpretation and enforceability of these Official Rules, or the rights and obligations of the Firm and Sponsor in connection with the Contest, shall be governed by, and construed in accordance with, the laws of the State of Michigan without giving effect to any choice of law or conflict of law rules (whether of the State of Michigan or any other jurisdiction), which would cause the application of the laws of any jurisdiction other than the State of Michigan.

20. Severability: If the application of any provision of these Official Rules to any particular facts or circumstances shall for any reason be held to be invalid, illegal or unenforceable by a court, arbitration panel or other tribunal of competent jurisdiction, then (a) the validity, legality and enforceability of such provision as applied to any other particular facts or circumstances, and the other provisions of these Official Rules, shall not in any way be affected or impaired thereby; and (b) such provision shall be enforced to the maximum extent possible. In addition, if any provision contained in these Official Rules shall for any reason be held to be excessively broad as to duration, geographical scope, activity or subject, it shall be construed by limiting and reducing it, so as to be enforceable to the extent compatible with applicable law.

21. Entrant's Personal Information: By participating in the Promotion, Firm and its Representative authorizes the transfer of their personal data to Sponsor and Administrator for the purposes of administration of the Promotion. All information submitted to the Sponsor as part of this Promotion will be treated in accordance with the Sponsor's privacy policy, available at <http://about.intuit.com/privacy/> and Administrator's privacy policy available at <http://www.helloworld.com/privacy-policy>. In respect of entrants which are EU residents, each of the Sponsor and the Administrator rely on the legal basis of consent under the General Data Protection Regulation for such processing. Personal information will be used to by Administrator to contact potential winners and fulfill the prizes. Entrants have the right to access, withdraw, have made portable, and correct their personal data. Entrants may request such action by sending a message to Sponsor at privacy@intuit.com. The data controller is the Sponsor. The data recipients are the Administrator and the Sponsor. The personal data of the entrant will be stored by Administrator on servers located within the United States. The U.S. government maintains access rights and that personal data may be subject to subsequent processing without comprehensive legal restraints (i.e., the Sponsor and/or the Administrator may be required, under U.S. law, to share my personal data with third parties, such as U.S. governmental authorities).

22. Winner List: For a winner list, visit <http://bit.ly/2LiDSh6>. The winner list will be posted after winner confirmation is complete.

23. Promotion Emails: By participating in the Promotion, you agree to receive emails related to the Promotion including, but not limited to, a registration confirmation email.

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