

Please note that these updated Service-Specific Supplemental Terms will apply to your Avalara Service upon any renewal, upgrade, or Service purchase made on or after June 15, 2025, and any renewal made on or after July 15, 2025..

These Avalara 1099 & W9 Service-Specific Supplemental Terms (“**1099 Terms**”) govern Customer’s purchase and use of Avalara 1099 & W9 and other Services available on the Track1099 by Avalara website. These 1099 Terms are in addition to, and incorporate by reference, the Avalara Service Terms and Conditions located at <https://www.avalara.com/terms> (the “**Terms**”). Any capitalized terms used in these 1099 Terms and not defined have the meanings given in the Terms.

1. **Definitions.**

- a. “**Client**” means a client of Customer.
- b. “**Client Data**” means any information uploaded to the Service(s) by Customer or Customer's Authorized Users relating to Customer's Clients. Customer Data includes Client Data.
- c. “**Filing Agency**” means a filing agency to which Avalara will file on behalf of the Customer.
- d. “**Recipient**” means any person or entity, other than a Filing Agency, Client, or Customer, sent a form through the Services by the Customer.
- e. “**Recipient Data**” means any information uploaded to the Services by Customer or Customer's Authorized Users relating to a Recipient. Customer Data includes Recipient Data.

- 2. **Use of the Services.** Customer is authorized to use the Services solely for Customer’s internal business operations. If the Customer is in the business of providing accounting or advisory services as part of its standard offerings, internal business operations may include the preparation and filing of forms for Clients. Avalara grants Customer a limited, nonexclusive, nontransferable, nonassignable, sublicensable (to the applicable Client), worldwide license to use and retain the Content that is returned by the Services to Customer solely for its internal business operations in connection with the specific request for which it was provided.
- 3. **Authorization.** Customer authorizes Avalara, on Customer’s behalf, to perform TIN matching as requested and to file 1099-series, 1095-B, 1095-C, W-2, 1042-S, T4A, and other forms as applicable. Customer also authorizes Avalara to interact with appropriate authorities and other third parties on Customer’s behalf for validation, filing, and status retrieval purposes related to the Services. Customer understands that Avalara will not interact with regulatory agencies on behalf of Customer or Clients for any other purpose.
- 4. **Customer Responsibilities.** In addition to the responsibilities in the Terms, Customer shall: (i) verify the filing status of each form filed on Customer’s behalf by Avalara; (ii) ensure the Recipient received all necessary forms, and if not, transmit such forms to the Recipient; and (iii) promptly correct any errors in the forms. Customer shall download and save records as necessary to maintain its own records separate from the Service(s) and shall not use the Service(s) for general archiving or back-up purposes. Customer shall only request TIN matching for income subject to backup withholding on Forms 1009-B, DIV, INT, MISC, NEC, OID, 1099-K, G and/or PATR. Customer affirms that all of the information entered into the Service for the purposes of submission, including to the Internal Revenue Service, Canadian Revenue Agency, and/or Social Security Administration, is true and accurate, to the best of Customer’s knowledge.
- 5. **Use of Services for Clients.** Customer is solely responsible for properly setting up, configuring, and maintaining Customer’s profile in order to use the Services for the benefit of Customer’s Clients, including, for each Client, (i) any information needed by Customer to use the Services on behalf of Customer’s Clients; (ii) the preparation, content, accuracy, and review of any forms that Customer prepares using the Services; and (iii) the timely filing of any forms, including any late filings due to unavailability of the Services. Customer represents and warrants that it has the right to

upload Client Data and Recipient Data to the Services.

6. **Additional Indemnification.** In addition to Customer's indemnification obligations set forth in the Terms, Customer shall indemnify and defend Avalara against any Losses arising from a third-party claim that results from Customer's use of the Services for a Client (except for third-party claims for Infringement or arising solely from Avalara's breach of the Agreement or Applicable Law).
7. **Deviations from the Terms.**
 - a. **Planned Downtime.** Avalara may elect not to provide notice of planned downtime.
 - b. **Automatic Upgrades and Overages.** If Customer purchased the Services through the Track1099 by Avalara website, Customer cannot use more forms than it has paid for. If Customer purchased through an assisted sales process and Customer exceeds the number of forms included in Customer's subscription, Customer will be charged for any additional forms at the per-form overage price specified on the applicable Order Document unless Customer upgrades to a higher usage tier.
 - c. **One-Time Services.** Some Services offered on the Track1099 by Avalara website are one-time Services. In such case, provisions in the Terms specifically applicable to subscription Services do not apply. Unless otherwise specified, unused one-time Services will expire one year after purchase.
 - d. **Indemnification.** Sections 10(a)(2) and 10(a)(3) of the Terms (*Indemnification by Avalara*) do not apply to purchases made through the Track1099 by Avalara website.
8. **Data Exports.** Customer expressly acknowledges that Client Data (if any) uploaded to Avalara 1099 & W9 or otherwise provided to Avalara may be made available to Avalara's Affiliates and subprocessors, which include persons outside of the United States. Customer shall obtain any consents to disclose Client Data to Avalara and its Affiliates and subprocessors as may be required by Applicable Law, including, for example, 26 U.S.C. § 6713 and 26 U.S.C. § 7216.