

REVIEW DRAFT | NOT EXECUTED | VERSION 2026-09-26-D1

Foundation - \$89 Entry Price

Review Status

Review draft, version 2026-09-26-D1. Use this role addendum with the completed Professional Enrollment Agreement. It is a package description, not an executed appointment. The entry price is not a representation that all recurring or activity-based costs are included.

Who This Pathway Serves

A supported start for an individual preparer.

Before Activation

PTIN and an approved filing arrangement; identify the responsible ERO and any review-before-submission process.

Scope To Define In Your Order

Software orientation, business-readiness orientation, onboarding coordination and assigned first-line support as itemized in the final order.

What This Package Does Not Grant

No independent EFIN, bureau-line access, resale appointment, tax-law instruction or CE is included.

Fees, Support And Delivery

Complete the exact supplier, edition, tax years, license count, term, Cima services, orientation, support limits, required fees and renewal terms in Schedule A before payment. Confirm any approved filing review, bank enrollment or compensation schedule separately. Unconfirmed features must not be sold as included.

Refund And Provider Boundaries

If Cima cannot approve or provision this purchased package, the enrollment payment is refunded in full. After activation, the completed customer agreement and applicable law control. Provider materials stay in authorized channels. Original Cima orientation does not replace provider requirements or qualified tax instruction.

Acceptance And Scope Reference

Customer / order reference: _____

Approved role scope / provider authorization reference: _____

Final agreement and addendum versions: _____

Customer initials / date: _____ Cima initials / date: _____

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Independent Practice - \$199 Entry Price

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Who This Pathway Serves

For a professional operating a tax office.

Before Activation

Maintain the PTIN/EFIN and other requirements applicable to the office; verify software/network restrictions and the authorized ERO support route.

Scope To Define In Your Order

Authorized software access, specified one-to-one orientation, office-readiness planning and identified support contacts.

What This Package Does Not Grant

No unrestricted software distribution, guaranteed bank enrollment or unlimited support commitment is included.

Fees, Support And Delivery

Complete the exact supplier, edition, tax years, license count, term, Cima services, orientation, support limits, required fees and renewal terms in Schedule A before payment. Confirm any approved filing review, bank enrollment or compensation schedule separately. Unconfirmed features must not be sold as included.

Refund And Provider Boundaries

If Cima cannot approve or provision this purchased package, the enrollment payment is refunded in full. After activation, the completed customer agreement and applicable law control. Provider materials stay in authorized channels. Original Cima orientation does not replace provider requirements or qualified tax instruction.

Acceptance And Scope Reference

Customer / order reference: _____

Approved role scope / provider authorization reference: _____

Final agreement and addendum versions: _____

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Reseller - \$799 Entry Price

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Who This Pathway Serves

For an expressly approved software-distribution role.

Before Activation

Written reseller authorization must identify permitted products, customers, territory if any, pricing permissions and marketing restrictions. Credentials required for any preparation activity remain separate.

Scope To Define In Your Order

Authorized distribution coordination, onboarding scope and business-readiness resources identified in the final order.

What This Package Does Not Grant

No commission rate, sub-reseller appointment, redistribution of training or provider-marketing right is created by buying this package.

Fees, Support And Delivery

Complete the exact supplier, edition, tax years, license count, term, Cima services, orientation, support limits, required fees and renewal terms in Schedule A before payment. Confirm any approved filing review, bank enrollment or compensation schedule separately. Unconfirmed features must not be sold as included.

Refund And Provider Boundaries

If Cima cannot approve or provision this purchased package, the enrollment payment is refunded in full. After activation, the completed customer agreement and applicable law control. Provider materials stay in authorized channels. Original Cima orientation does not replace provider requirements or qualified tax instruction.

Acceptance And Scope Reference

Customer / order reference: _____

Approved role scope / provider authorization reference: _____

Final agreement and addendum versions: _____

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Service Bureau - \$1,499 Entry Price

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Who This Pathway Serves

For an expressly approved professional network and support role.

Before Activation

Written bureau appointment must identify responsibilities, authorized representatives, downstream appointment powers and approved support/escalation routes.

Scope To Define In Your Order

Authorized software and onboarding coordination, role planning and specified support responsibilities within the approved scope.

What This Package Does Not Grant

No automatic sub-bureau appointment, unrestricted sublicensing, direct provider obligation or universal right to the bureau line is included.

Fees, Support And Delivery

Complete the exact supplier, edition, tax years, license count, term, Cima services, orientation, support limits, required fees and renewal terms in Schedule A before payment. Confirm any approved filing review, bank enrollment or compensation schedule separately. Unconfirmed features must not be sold as included.

Refund And Provider Boundaries

If Cima cannot approve or provision this purchased package, the enrollment payment is refunded in full. After activation, the completed customer agreement and applicable law control. Provider materials stay in authorized channels. Original Cima orientation does not replace provider requirements or qualified tax instruction.

Acceptance And Scope Reference

Customer / order reference: _____

Approved role scope / provider authorization reference: _____

Final agreement and addendum versions: _____

Customer initials / date: _____ Cima initials / date: _____

Do not sign this review draft.