

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

A Separate Specialist Relationship

Status

Customer-facing disclosure draft, version 2026-09-26-D1. The destination is coming soon; this notice does not sell a service, promise a launch date or create a referral agreement.

Who Provides These Services

Tax Office Marketing, Tax Business Branding, Tax Office Website Services and Tax Professional Business Systems are complementary specialist services planned to be provided by Tax Branding Pro. Cima Tax Pro is not presented as their provider. They are not automatically included in a Cima software package.

Scope, Contract And Payment

Any eventual engagement must identify Tax Branding Pro's legal contracting entity, scope, price, deliverables, timeline, rights, privacy terms and cancellation policy in its own agreement. Cima's enrollment payment does not pay for these services unless a separate, lawful arrangement expressly says so.

Provider And Network Permissions

Participation in a provider's network may restrict vendors, marketing and outside promotions. Required written approvals must be obtained before a restricted engagement or promotion. This notice does not assert that Tax Branding Pro is an official partner, approved vendor or endorsed supplier of Cima's upstream provider.

Interest Is Not Automatic Sharing

An interest request records that you want more information. It is not consent to share a client list, application file or taxpayer data. A specific referral request and any legally required consent must precede a transfer.

Compensation Disclosures

If a future referral carries compensation, describe the material connection clearly at the relevant recommendation or link before the customer acts. Identify the separate provider and disclose any effect on the customer's charge. No rate, exclusive relationship or commission entitlement is established here.

Your Next Step

Use the clearly labeled coming-soon or interest destination on Cima's website. No fabricated live external URL or payment destination is supplied.