



ProAdvisor Marketing Development Fund

Program guide



Table of contents

How the program works	4
Approved marketing activities	5
QuickBooks branding & logos	9
Marketing tips for success	14
Legal details	15

What it's all about

The QuickBooks ProAdvisor Marketing Development Fund is here to help you reach your marketing goals. Gold, Platinum, and Elite ProAdvisors are welcome to apply.

For successful applicants, we'll reimburse 50% of your marketing spend up to \$3,000 (including HST).

We'll also connect you with an Intuit marketing expert to help you refine your marketing plan.



How the program works

STEP 1

Submit your application

- Be sure you're a Gold, Platinum, or Elite ProAdvisor.
- Read through this guide to learn the program requirements.
- When you're ready, develop your marketing plan and submit an application by January 4, 2024.
- We'll let all applicants know the status of their application.

STEP 2

Create your campaign and get approved

- Work with our marketing expert to get advice and guide your marketing efforts.
- Once your plan is pre-approved, you can begin developing the campaign.
- We'll review your final creative and give you the green light to launch!

STEP 3

Launch your marketing campaign

- After launch, measure your work against your initial objectives to help develop learnings for future marketing plans.
- All marketing activities within this campaign must be completed and submitted for reimbursement by May 31, 2024.

STEP 4

Submit a reimbursement

- Once your marketing activities are complete, submit them for reimbursement.
- Be sure to include your supporting documents:
 - Marketing activity details (links, photos, or screenshots of your completed marketing activity)
 - Your paid vendor invoices
 - An invoice billing Intuit for 50% of the marketing activity up to a maximum of \$3,000*

** Payment terms are Net30. Canadian partners are paid in CAD. It is at your discretion to include or exclude tax provided the amount requested does not exceed the \$3,000 limit.*

WHAT KIND OF MARKETING CAN YOU DO?

Goal: Increase awareness

Marketing channel	Activities eligible for funding	Promotional requirements	Ineligible activities
Radio or TV	<ul style="list-style-type: none"> All advertising across approved TV and radio content channels 	<ul style="list-style-type: none"> Minimum 15 seconds in duration QuickBooks Online messaging in ad copy Clear call-to-action to contact your firm 	<ul style="list-style-type: none"> Ads that mention other accounting software options Ads going to websites that do not meet the website guidelines
Online display & social advertising	<ul style="list-style-type: none"> LinkedIn, Facebook, Instagram advertising Platform expense to set-up and run advertising Digital online display platform advertising Ad creation - copywriting, design 	<ul style="list-style-type: none"> Content in ad copy must include QuickBooks Online branding, messaging, and benefits A QuickBooks ProAdvisor badge A clear call-to-action to contact your firm 	<ul style="list-style-type: none"> Ads that mention other accounting software options Google SEO, SEM Ads previously published from other campaigns
Online virtual events	<ul style="list-style-type: none"> Event promotion collateral Event presentation content and design Event registration cost 	<ul style="list-style-type: none"> Minimum 10 attendees Minimum 20-minute duration Minimum 25% of event content must include QuickBooks Online branding, messaging, and benefits A QuickBooks ProAdvisor badge A clear call-to-action to contact your firm 	<ul style="list-style-type: none"> Ads that mention other accounting software options Google SEO, SEM Ads previously published from other campaigns
Trade show and conferences	<ul style="list-style-type: none"> Event promotion collateral Event presentation content and design Event registration cost Booth signage 	<ul style="list-style-type: none"> Event content must include QuickBooks Online branding, messaging, and benefits A QuickBooks ProAdvisor badge A clear call-to-action to contact your firm Share photos with QuickBooks team at conclusion of event 	<ul style="list-style-type: none"> Event platform subscription costs Physical swag, giveaways Travel, lodging, and other travel related expenses

WHAT KIND OF MARKETING CAN YOU DO?

Goal: Increase consideration, conversion, or retention

Marketing channel	Activities eligible for funding	Promotional requirements	Ineligible activities
Digital newsletters and magazines	<ul style="list-style-type: none">• Community newsletters• Digital industry publications for small business owners	<ul style="list-style-type: none">• QuickBooks Online messaging in ad copy• Clear call-to-action to contact your firm	<ul style="list-style-type: none">• Online subscription costs
Website	<ul style="list-style-type: none">• Design and development of a new website• Improvements to current website	<ul style="list-style-type: none">• Content on your website must include QuickBooks Online branding, messaging, and benefits• A QuickBooks ProAdvisor badge• A clear call-to-action to contact your firm	<ul style="list-style-type: none">• Website platform, hosting costs• A website or landing pages without QuickBooks Online content• Internal costs e.g. employee salary or time
Emails, digital brochure, case study, whitepaper	<ul style="list-style-type: none">• Content writing and marketing material development costs like photography, video, etc...	<ul style="list-style-type: none">• Content in materials must include QuickBooks Online branding, messaging, and benefits• A QuickBooks ProAdvisor badge• A clear call-to-action to contact your firm	<ul style="list-style-type: none">• Online platform subscription costs

WHAT KIND OF MARKETING CAN YOU DO?

Marketing partner/agency

Marketing channel	Activities eligible for funding	Promotional requirements	Ineligible activities
Marketing partner/agency	<ul style="list-style-type: none">• Developing a marketing strategy and plan• Developing the campaign and marketing activities included in this program guide	<ul style="list-style-type: none">• Marketing activities must follow the program guide and QuickBooks branding guidelines	<ul style="list-style-type: none">• Ongoing monthly retainer fees• Marketing activities that are not related to the QuickBooks campaign

APPLICATION PROCESS

Selection criteria

QuickBooks will admit applicants into the program based on the following criteria:

- Quality of marketing plan
- Clear and concise implementation plan
- Tactics chosen are relevant to your firm's goals
- Time milestones are clearly outlined and achievable
- Other considerations such as accepting a variety of firm sizes, locations, and marketing channels



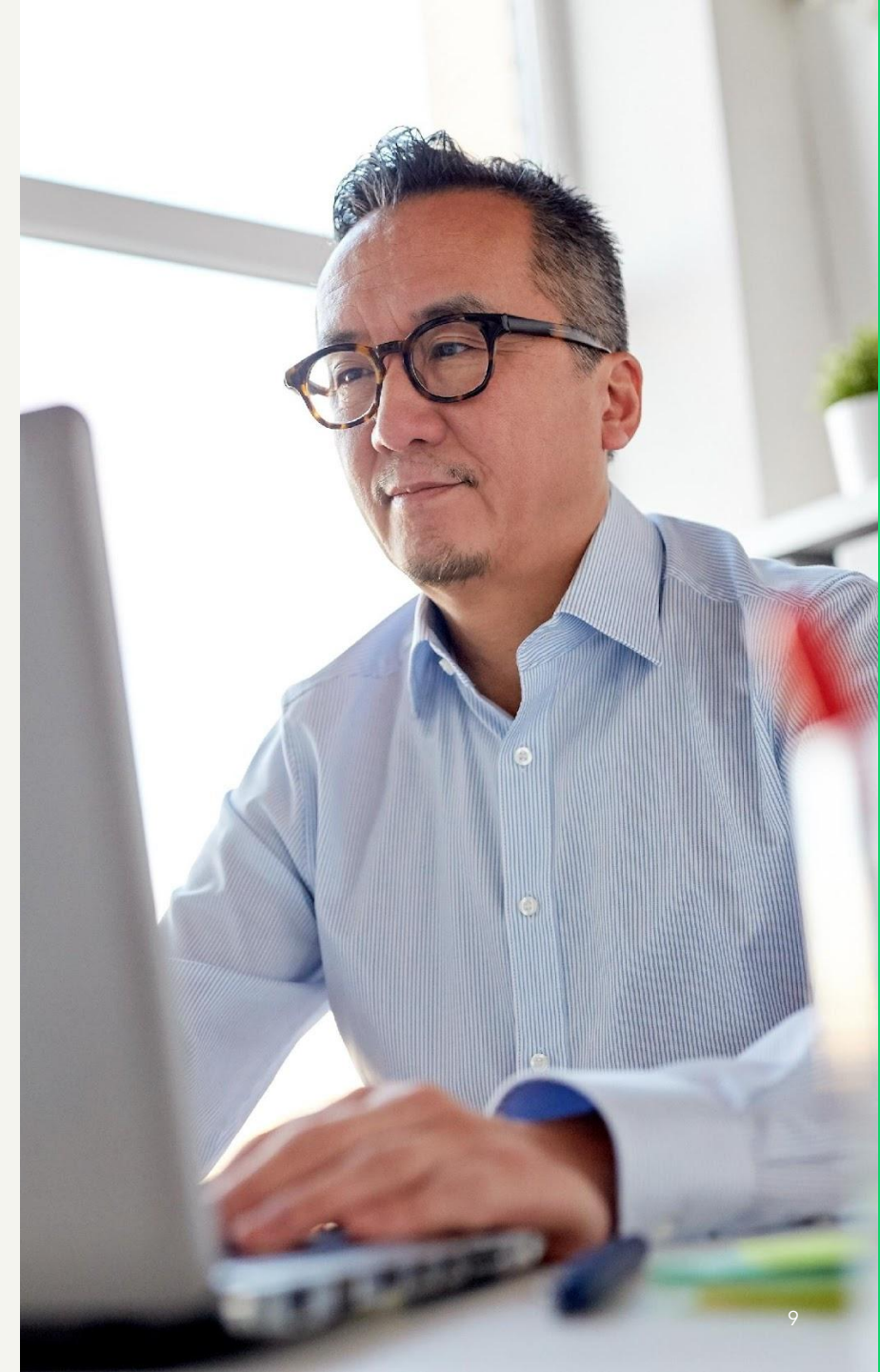
Guidelines for using the QuickBooks brand and materials

When you use the QuickBooks brand on promotional materials, it reflects on our business as well as yours. That's why we must approve any use of the QuickBooks brand.

We want to make the approval process quick and easy for you, so we'll do our best to give you a speedy and helpful response. Please contact your account manager if you have any questions.

Brand details and downloads:

[Brand Guidelines](#)



How QuickBooks Online benefits your clients

Use the information below in your marketing materials to help show potential clients the benefits of working with you and QuickBooks Online.

Work from anywhere

QuickBooks Online is cloud accounting software that keeps your books at your fingertips anytime, anywhere—all you need is an internet connection.¹ Get even more freedom with the QuickBooks mobile app, where all your info is synced in real-time.²

Send invoices & get paid fast

Quickly and easily send professional invoices with a personal touch, like your logo and brand colours. You can even add a Pay Now button to let your customers pay by credit card or Apple Pay in just a few clicks.³

See your whole business

QuickBooks Online simplifies how you track your business finances, so you can focus on the bigger picture. From money in, to money out, to managing your team, get a clear view of your business in one easy-to-use solution.

Data protection

QuickBooks takes security seriously. You'll have peace of mind with advanced, industry-recognised security safeguards that keep your financial data private and protected.

Save time & stay organized

Boost efficiency and reduce entry errors when you automate your workflows. Set up recurring invoices and credit card payments, schedule overdue payment reminders, run auto-payroll, and much more—right in QuickBooks Online.⁴

Connect with your other apps

QuickBooks Online syncs with over 450 business apps to streamline how you work and connect different parts of your business in one place.⁵

1. Anywhere Access: QuickBooks Online requires a computer with a supported Internet browser (see [System Requirements](#) for a list of supported browsers) and an Internet connection (a high-speed connection is recommended).

2. QuickBooks Online Mobile: QuickBooks Online mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.

3. Pay-enabled invoices: Requires a separate QuickBooks Payments account which is subject to eligibility criteria, credit and application approval. E-invoicing QuickBooks Payments is an optional fee-based service. Additional fees may apply. Additional terms and conditions apply.

4. Auto Payroll: Subscription to QuickBooks Online Payroll is required. Available if setup for the company is complete. At least one employee has completed setup and has consistent payroll that qualifies for automation (i.e. salaried or hourly with default). Company must complete bank verification if Employee has direct deposit as the payment method, and the first payroll must run successfully. The account must not have a hold.

5. Third party apps: Apps may require a third-party subscription. Third party applications available on [apps.com](#). Subject to additional terms, conditions, and fees.

How QuickBooks Online benefits your clients

Use the information below in your marketing materials to help show potential clients the benefits of working with you and QuickBooks Online.

Always know where you stand

Connect your business bank account to QuickBooks Online to track expenses and see your numbers in real-time.¹ And stay ahead of tax time with automatic expense sorting, so you never miss a deduction.²

Solutions that grow with you

From sending your first invoice, to paying a team of employees, QuickBooks Online has flexible solutions for every stage of your business. You can also access free training and support, so the answers you need are never far away.

Valuable business insights

Stay on top of the numbers and gain real-time insights with straightforward reports, like profit & loss, expenses, and balance sheets. With the right information at the right time, QuickBooks Online helps you make informed business decisions now—and better prepare for tomorrow.

Tax time made easy

QuickBooks Online helps make navigating sales tax payments and refunds more straightforward. And with automatically categorized expenses and organized receipts, you'll be ready come tax time.³

Comprehensive payroll & time tracking

With your accounting, payroll, and time tracking all synced within QuickBooks Online, you can streamline your workflow and free up more time to focus on your day-to-day.⁴

1. Syncing bank and cards with QuickBooks online services: Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees.

2. Automatic Sales Tax: Underlying sales tax rates are estimated based on the location information associated with each individual transaction. Additional factors that may impact sales tax rates include product type, date, and customer type. Tax information needs to be validated prior to submitting to the CRA.

3. Automated tax payments and filings: Automated tax payments and filing available for provincial and federal taxes. Enrollment in e-services is required for tax payments and filings only. Automated tax payments and filings for local taxes available in QuickBooks Online Payroll Premium and Elite only.

4. QuickBooks Time integration: Additional fees may apply. Time tracking included in the QuickBooks Online Payroll Premium and Elite subscription services. Features vary. The QuickBooks Time mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Time access is included with your QuickBooks Online Payroll Premium and Elite subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.

APPROVED PHRASING

How to describe your QuickBooks expertise



Approved

Make sure your company's name and logo are distinctly larger than and apart from approved phrases

Independent QuickBooks Consulting Professional(s)

Independent QuickBooks Consulting Service(s)

Independent QuickBooks Training Professional(s)

Independent QuickBooks Training Service(s)

Bookkeeper offering services to QuickBooks Users

Bookkeeper answering all your QuickBooks questions

Independent QuickBooks Setup Services



Not approved

QuickBooks currently only offers certification on QuickBooks product use.

Independent QuickBooks Accountant

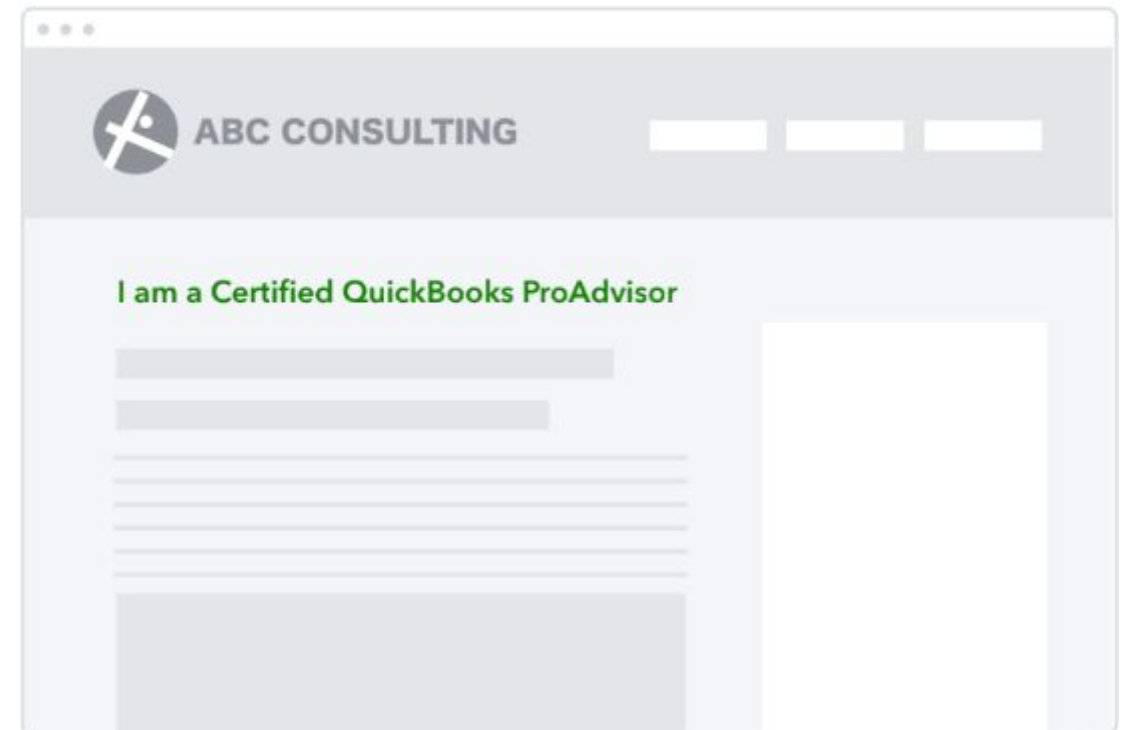
Independent QuickBooks Accounting

APPROVED PHRASING

How to represent yourself as a ProAdvisor

Be clear, transparent, and honest about your relationship with QuickBooks. Here are a few of the ways you can represent yourself as a ProAdvisor.

- Provide valuable information to your potential clients about the type of services your firm offers.
- Call yourself a “Certified QuickBooks ProAdvisor,” once you’ve completed one of the ProAdvisor certifications.
- Say you’re an “Independent QuickBooks Consulting Professional.”
- Represent your company as an “Independent QuickBooks Consultant Service.”
- “I’m a bookkeeper who specializes in QuickBooks.”



Marketing tips

Set goals

Establish short -and long-term goals so you can make a clear plan and measure your success.

Define your target

Identify your target client in alignment with your business goals, and by analyzing your current client base for key trends.

Make a budget

Set aside time and budget for your marketing activities.

Plan ahead

Timing is important when marketing, so plan marketing ahead of season. For example, start to plan for Thanksgiving at the end of summer.

Narrow your search

Pay attention to where your target customer already interacts and try to meet them in those channels.

Ask questions

Ask an expert when you need help! An experienced mentor can help you get started the right way.

Discover more marketing resources on the [Intuit Marketing Hub](#).

Legal details

1. Applications to the Marketing Development Program (“MDF Program”) will be accepted from December 11, 2023 to January 4, 2024. Intuit will review and notify you of your acceptance into the MDF Program within 10 business days when applications close. MDF Program is only available in Canada. Intuit reserves the right at its sole discretion to suspend, modify or terminate the MDF Program and, if terminated, Intuit shall complete its obligations to participating ProAdvisors prior to such termination.
2. To be eligible, you must be a QuickBooks Certified ProAdvisor in good standing under the ProAdvisor Program Agreement and policies, including logo and other use restrictions (collectively the “Agreement”). A ProAdvisor must have reached Gold, Platinum or Elite tier as of the application date; and meet the criteria of the MDF Program; and maintain throughout the MDF Program.
3. Eligible ProAdvisor will receive funds from Intuit in an amount up to 50% of the marketing activities submitted, but no more than \$3000 CDN (including any non-recoverable GST/HST). Marketing activities must only promote QuickBooks Online in Canada, comply with the terms of the Agreement and requirements in the Guide (defined below) and must be completed and billed no later than May 31, 2024.
4. MDF Program is limited to 20 eligible ProAdvisors. Selection will be subject to MDF Program criteria and in Intuit’s sole determination. All decisions are final.
5. Reimbursements are limited to marketing activities outlined within the ProAdvisor Marketing Development Fund program guide (“Guide”). Intuit will not cover costs for marketing activities or other items not expressly stated in the Guide and/or where QuickBooks products are resold.
6. Participating ProAdvisor must review and obtain prior written approval from Intuit before publically launching its marketing activities to be submitted to the MDF Program.
7. Intuit has the right to refuse to release funds if the ProAdvisor’s marketing activities do not comply with any aspect of the MDF Program and the Guide, including but not limited to not following branding guidelines and/or failure to obtain Intuit approvals.
8. ProAdvisor and ProAdvisor marketing activities must comply with local laws and guidelines and not infringe on any copyrights. In conformity with the United States Foreign Corrupt Practices Act (“FCPA”), the Organization for Economic Cooperation and Development (“OECD”), the Corruption of Foreign Public Officials Act (“CFPOA”), and other Canadian laws prohibiting bribery, money laundering, and other corrupt practices and behavior, and with Intuit’s established corporate policies and [Supplier Code of Conduct](#), ProAdvisor shall not directly or indirectly offer, give, pay, promise to pay, receive, or authorize the payment of any bribes, kickbacks, influence payments, or other unlawful or improper inducements to any person in whatever form (including without limitation, gifts, travel, entertainment, contributions, or anything else of value). ProAdvisor shall maintain true, accurate, and complete books and records with respect to all payments made to or for the benefit of third parties in connection with the MDF Program or that relate in any way to the goods or services provided to or for Intuit. In rendering the services contemplated hereunder, ProAdvisor shall take (and cause third parties to take) all measures, actions and steps in order to ensure that no transactions or interactions with any persons (natural or entities) included in lists maintained by the United States, Canada (including but not limited to the Consolidated Canadian Autonomous Sanctions List) or other applicable jurisdictions prohibiting transactions with and the export of US products to certain entities, people and jurisdictions including Russia, Cuba, Iran, North Korea, Syria and the Crimea, Donetsk (“DNR”), and Luhansk (“LNR”) regions of the Ukraine.
9. Qualifying reimbursements will require an invoice to Intuit Canada reflecting fifty percent (50%) of your total marketing activity eligible costs not to exceed \$3000 CDN and thirteen percent (13%) HST. ProAdvisor will need to attach relevant and supportive documentation, such as vendor invoices; payment receipts; and examples of your approved and completed marketing activities (collectively “Claims documentation”). Claims documentation must be submitted to Intuit no later than May 31, 2024. Any Claims documentation submitted after this date will not be honoured.
10. After completion of your campaign, submit your invoice to Intuit Canada ULC (c/o Blend Creative Studio Inc.) with the following GST number: 139217491 RT0001 which is located in Ontario. Unless otherwise expressly stated, any amount payable and/or awarded in this Program is exclusive of GST/HST. Intuit is not obliged to pay the amount of any GST/HST until you provide a valid, compliant invoice to Intuit for the taxable supply and any GST/HST must be specified as a separate item. All items that are zero-rated, exempt or to which the GST/HST does not apply, must be identified as such on all invoices if required by applicable laws and/or regulations. Where Intuit has agreed to reimburse you for any costs or expenses, Intuit shall also reimburse you for any GST/HST incurred by you in respect of the relevant costs or expenses to the extent that you are not entitled to credit or repayment from the relevant tax authority in respect of the GST/HST. “GST/HST” means the goods and services tax or the harmonized sales tax administered pursuant to the Excise Tax Act (Canada) R.S.C. 1985. C. E-15, as amended and the regulations thereunder and/or under any successor or parallel federal or provincial legislation that imposes tax on the recipient of goods and services.
11. Payment will be processed and sent by cheque to ProAdvisor within 45 days of Intuit’s receipt of your invoice and Claims documentation.



Thank you!

We're excited to partner with you.

If you have any questions or feedback, please contact your QuickBooks Account Manager or email us at QuickBooks_ProAdvisor_MarketingFund@intuit.com

