

QuickBooks UK Switcher Bonus Offer terms (“Switcher Bonus Terms”)

1. What is the UK Switcher Bonus Offer

The UK Switcher Bonus Offer is a sales pilot initiative whereby QuickBooks offers a small financial cash bonus to UK accountants or bookkeepers, who intend to switch to QuickBooks subscriptions 25 or more of their clients who are currently using a different financial management software solution (“Switcher Bonus”). In order to be considered for the Switcher Bonus accountants and bookkeepers must fulfill the eligibility criteria set forth herein.

The Switcher Bonus Terms supplement the terms of the QuickBooks Terms of Service and the QuickBooks ProAdvisor Program Terms (a copy of which is available [here](#) accepted by the ProAdvisor when registering for a QuickBooks Online Accountants) (together the “Agreement”).

The Switcher Bonus is available for a limited time and has a limited availability, once all Switcher Bonus units available are allocated, on a first come basis, the Offer will be discontinued. Applying for the Switcher Bonus or fulfilling all criteria does not guarantee approval. Intuit reserves the right to cease offering the UK Switcher Bonus at any time.

2. Criteria for being considered for the Switcher Bonus

Only accounting and bookkeeping firms who register or have registered for Intuit QuickBooks Online Accountant & ProAdvisor Programme and use “bill my firm” (wholesale) invoicing (“ProAdvisor”) may be considered for the Switcher Bonus.

Additional criteria to be fulfilled by the ProAdvisor in order to be considered for the UK Switcher Bonus are:

- i) Demonstrate serious intention to switch to QuickBooks Online existing clients in the ProAdvisor firm or practice who are on an different FMS (financial management solution). The ProAdvisor must show in writing proof of payment to a IFMS other than QuickBooks, such as a payment receipt for a non QuickBooks Online provider, or show proof of migration via a solution such as Movemybooks, DataSwitcher or MMC converter. This proof must be sent via email to the Intuit Sales team member, for Intuit to assess eligibility.
- ii) Purchase 25 or more subscriptions to QuickBooks UK and use these subscriptions to switch clients over from an alternative FMS to QuickBooks Online. There is no set criteria for the QuickBooks offering mix, and this Switcher Bonus is applicable to and will be calculated on the basis of the wholesale billing pricing as set forth in A minimum of 25 subscriptions to be purchased under this Offer (“Subscription Minimum Quantity”).

iii) All subscriptions must be assigned to a client switching from a different FMS and maintained active for at least ninety (90) days from the date of purchase ("Minimum Period").

The Switcher Bonus amount calculated by Intuit will be paid to the Eligible ProAdvisor 90 days after they have agreed in writing to the Switcher Bonus Terms, and have met all the eligibility criteria and the above condition to keep all subscriptions purchased under this offer active for no less than the Minimum Period.

Any officer or employee of a government or any department, agency, or instrumentality thereof, or of a public international organization, or any person acting in an official capacity for or on behalf of any such government or department, agency, or instrumentality, or for or on behalf of any such public international organization, or institution in any jurisdiction are not eligible for this offer.

The assessment and determination of a firm eligibility for the Switcher Bonus remains at Intuit sole discretion.

3. Switcher Bonus funding

Successful Switcher Bonus applicants who have been assessed by Intuit as meeting the eligibility criteria ("Eligible ProAdvisor(s)", will be notified of their successful Switcher Bonus application and funding amount in writing via email addressed to the email address registered on the QuickBooks account. If the Eligible ProAdvisor does not complete the step needed to take advantage of the Switcher Bonus Offer as set herein and specifically in section 6, within 15 days from receipt of the communication from Intuit that the Switcher Bonus is available, then the Eligible ProAdvisor will be forfeiting the opportunity to take advantage of the Switcher Bonus and Intuit reserve the right to reallocate it.

4. Value of Switcher Bonus

The Switcher Bonus amount per ProAdvisor firm / practice will be determined based on the subscriptions calculation and is limited to a maximum amount of £15,000 per single purchase. Refer to tables below.

The Switcher Bonus amount is calculated on the based on the quantity of QuickBooks subscriptions purchased (as per the tables below 'table indicating switcher bonus amount available per package' and 'Table indicating Wholesale billing Switcher Bonus amount available per subscription' to a maximum value of £15,000 per purchase.

Accounting/bookkeeping firms having multiple offices can apply only for one Switcher Bonus up to the maximum amount above.

Table indicating Switcher Bonus amount available per package:

Package	Duration of discounted price	Package Price	No of licenses in package	Package available	WSB discount @60%	Switcher Bonus Amount Available Per Package
5 for £5	12 months	£5	5	QBO Essentials	£8	£12
5 for £10	12 months	£10	5	QBO Plus	£12	£24
5 for £20	18 months	£20	5	QBO Simple Start	£6	£48
5 for £30	18 months	£30	5	QBO Essentials	£8	£72
5 for £40	18 months	£40	5	QBO Plus	£12	£96
20 for £60	18 months	£40	20	QBO Simple Start	£6	£96
20 for £60	36 months	£60	20	QBO Essentials	£8	£144
10 for £50	36 months	£50	10	QBO Plus	£12	£120
5 for £100	18 months	£100	5	QBO Advanced	£36	£240

Table indicating Wholesale billing Switcher Bonus amount available per subscription:

Product	list price	WSB discount	Switcher Bonus Amount Available Per License
QBO Simple Start	£14	£7	£17
QBO Essentials	£20	£10	£24
QBO Plus	£30	£12	£29
QBO Advanced	£90	£45	£108

Successful Switcher Bonus recipients will receive funds from Intuit via Intuit's agency partner in an amount up to £15,000 as a one off payment, after the Minimum Period (90 days) have concluded. Successful applicants will need to raise and send their invoice for the full amount via email to the nominated Intuit agency partner, who will process their invoice within 14 business days via bank transfer.

Unless otherwise expressly stated in the Agreement (or its Schedules and/or Exhibits), any consideration, amount payable, prices, fees are exclusive of VAT.

Intuit or its agency partner is not obliged under the Agreement (or its Schedules and/or Exhibits) to pay the amount of any VAT unless the accountant or bookkeeper provides a valid, compliant invoice for the taxable supply. All items that are zero-rated, exempt or to which VAT does not apply, must be identified as such on all invoices as required by applicable law.

5. Corporate Policies

Compliance with Anti-Bribery and Anti-Corruption Laws and Regulations. In order to comply with laws like the United States Foreign Corrupt Practices Act (FCPA), the UK Bribery Act (UKBA), and the Organization for Economic Cooperation and Development (OECD), as well as Intuit's own policies and [Supplier Code of Conduct](#), it is important that you and your employees do not use the Switcher Bonus to engage in any form of bribery, money laundering, or other corrupt practices. This means you cannot offer, give, receive, or authorize any bribes, kickbacks, or improper inducements to anyone, whether through gifts, travel, entertainment, contributions, or anything else of value. It is also necessary to keep accurate records of any payments made to third parties related to this agreement. If there are any concerns about compliance, Intuit or its representative has the right to audit your financial and other records for up to three years after the agreement ends.

Intuit reserves the right at its sole discretion to suspend, modify or terminate the Switcher Bonus program at any time but Intuit will honor its commitments in relation to Switcher Bonus already agreed with the Eligible ProAdvisors.

This UK Switcher Bonus is only available in the United Kingdom. Terms, conditions, pricing, special features, and service and support options subject to change without notice.

6. How do customers access the UK Switcher Bonus

Once the customer has been assessed by Intuit as eligible for the Switcher Bonus, this will be notified via email or phone by the Sales team member. The Sales team member will explain the amount available as the "Switcher Bonus", based on the packages the ProAdvisor is purchasing. Refer to the 'Value of Switcher Bonus' section above.

If the Eligible ProAdvisor is happy to proceed, they will need to purchase the agreed subscriptions (and sign the standard set of offer terms for the purchase of QB subscription and/or packages) and also need to agree to and return to Intuit a signed copy of the Switcher Bonus Offer Terms.

If not already provided, they would also need to provide proof of intention to switch clients from other FMS or excel, onto the QuickBooks subscription described in section 2 i .

Once the signed offer terms and Switcher Bonus Offer terms are received by Intuit via the e-sign method provided by Intuit the Switcher team will let The Calvary Collective (agency partner) know, to expect the invoice in due course from the customer.

Once the customer has reached 90 days of holding the QB licenses associated with the Switcher Bonus deal, Intuit will instruct the Eligible ProAdvisor to raise the invoice to the agency appointed by Intuit namely The Calvary Collective Invoices should be raised to The Calvary Collective:

The Cavalry Collective
Oldfield House
Hailsham Road
Polegate, East Sussex
BN26 6RF

Invoices must be sent to the Cavalry Collective directly via email to process at the following address michelle@thecavalrycollective.com.

Valid regular invoices, will be paid by bank transfer using the details provided by the customer.