

Lacerte Conversion Agreement

Please fill out, sign, and return this agreement with the conversion checklist and the backup media containing your client's data files. Please label each disk appropriately with your customer number.

Lacerte Customer # _____

***Begin Re-numbering Clients From** _____ (we automatically start numbering at 1,000)

* We MUST re-number your client files. Write the number from which you would like us to start re-numbering the converted files.

of Disks or CDs Included _____ Total # of Clients to be Converted _____

Please select the format of the backup data you are sending in for conversion:

- | | | |
|--|--|---|
| <input type="checkbox"/> ProSystem FX | <input type="checkbox"/> CSI UltraTax | <input type="checkbox"/> Tax Works |
| <input type="checkbox"/> ATX | <input type="checkbox"/> Drake | <input type="checkbox"/> Great Tax |
| <input type="checkbox"/> ProSeries | <input type="checkbox"/> Tax Wise | |

Firm Name		Contact	
Physical Address			Phone No.
City	State	ZIP Code	
E-mail Address			

Please read this agreement, then sign below:

I HAVE READ AND UNDERSTAND THE CONVERSION PROCEDURES AND CAPABILITIES AND ENCLOSED MY DATA FILES TO BE CONVERTED AND RETURNED TO ME. I HEREBY RELEASE AND AGREE TO INDEMNIFY INTUIT INC. FROM ALL LIABILITY AND DAMAGES RELATING TO THE CONVERSION, STORAGE, AND TRANSMITTAL OF THE CLIENT DATA FILES THAT I SUBMIT FOR THIS CONVERSION PROCESS. I AGREE TO REVIEW MY CLIENT DATA FILES AFTER THE CONVERSION PROCESS, AND I AGREE TO ASSUME FULL RESPONSIBILITY FOR THE COMPLETENESS AND ACCURACY OF ALL CONVERTED CLIENT DATA. INTUIT SHALL NOT BE LIABLE TO ME OR ANY THIRD PARTY FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, OR INCIDENTAL DAMAGES (INCLUDING DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, AND THE LIKE) ARISING OUT OF ANY ASPECT OF THE CONVERSION PROCESS AND I HEREBY RELEASE AND AGREE TO INDEMNIFY INTUIT FROM ANY SUCH CLAIMS.

Please send your backup to:

**Intuit Inc.
Attn: Intuit Conversions
5601 Headquarters Drive
Plano, TX 75024**

Signature _____

Date _____

Conversion Checklist

The goals of your data conversion are as follows:

- 1. To convert only the necessary tax data that is needed to prepare next years tax return, in your new tax software.**
- 2. To convert only your current tax data necessary to generate Tax Organizers to prepare for the upcoming tax year.**

The data conversion is NOT intended to do the following:

- 1. It is NOT intended to convert all of your data.**
- 2. It is NOT intended to allow you to generate a complete tax return based on your prior year tax data.**

Please check off the following items as you complete them, then sign this sheet before sending your files to Intuit:

- I understand the goals of this conversion process, and I have read the *About the Conversion* section on the Data Conversion web site.**
- I have used a supported media to backup my client's data files that I want Intuit to convert.** [Supported media types: **USB Flash Drive (recommended)**, DVD, CD-R, ZIP Disk or Memory Card (Compact Flash, SD, xD, Memory Stick, Smart Media)]
- I have followed the backup instructions as stated on the Data Conversion web site.**
- I have labeled all of my backup media with my customer number.**
- I have completed and signed the Conversion Agreement.**
- I understand the terms of the Conversion Agreement.**
- Before loading my converted client files, I will be sure I have updated the Demo/Eval copy of my new tax program with the licensed version that I purchased from Intuit.**
- I understand that I must submit this checklist, my signed conversion agreement and my backup media to:**

**Intuit Inc.
Attn: Intuit Conversions
5601 Headquarters Drive
Plano, TX 75024**

Signature_____

Date_____