Version 1.0

1 October 2026

AI Product Specific Terms for Tax, Trade, Audit, and Accounting Services ("AI Product Specific Terms")

1. APPLICABILITY

1.1. These AI Product Specific Terms apply to Customer's access and use of Services as set out in the applicable Ordering Document. These AI Product Specific Terms supplement, and are incorporated into, the Agreement between the parties.

1.2. If there is a conflict between these AI Product Specific Terms and any other document forming the Agreement, the order of precedence is as follows: (i) the AI Usage Policy; (ii) Third-Party Provider Terms (to the extent applicable to the relevant Third-Party Service); (iii) the applicable Ordering Document; (iv) these AI Product Specific Terms; (v) any other Product Specific Terms applicable to the Services; (vi) the Thomson Reuters General Terms and Conditions (or other applicable governing terms); and (vii) any remaining provision or element of the Agreement. A breach of these AI Product Specific Terms is a breach of the Agreement.

1.3. Unless otherwise defined herein, any capitalized terms shall have the meanings given to them in the Agreement. Where a term defined below is also defined in the Agreement, the definition below controls for purposes of these AI Product Specific Terms.

2. DEFINITIONS

2.1. **"LLM Feature"** means any AI Functionality of the Service that uses a large language model (LLM), whether the LLM is all or part of the Service.

2.2. **"Service Providers"** means Thomson Reuters service providers (which may include Thomson Reuters Affiliates), contractors, and other third parties which provide services (such as, but not limited to, data hosting, software support, etc.) in support of Thomson Reuters provision of the Services, as well as providers of Third-Party Services.

2.3. **"Taxpayer"** means the taxpayer whose data is processed within the Services.

3. AI IN THE SERVICES

3.1. **Usage Limits**. Thomson Reuters may, acting reasonably, at any time during the Term, impose or modify usage limits on any LLM Feature upon 60 days' prior written notice to Customer. The imposition of usage limits shall not reduce the charges payable by Customer under the Agreement.

3.2. **Exceeding Usage Limits**. If, after usage limits have been imposed, Customer exceeds the applicable usage limit, Thomson Reuters may require Customer, by written notice, within 30 days to: (i) purchase additional usage capacity at Thomson Reuters then-current pricing; or (ii) upgrade to a higher-tier service plan, if available. If Customer does not make such election within that period, Thomson Reuters, acting reasonably, may exercise any of the following, in any order: (a) cap or throttle access to the affected LLM Feature until the next usage period resets or until Customer

purchases additional usage capacity or upgrades its service plan, as applicable; or (b) at its discretion, permit continued use of the LLM Feature and charge Customer for such excess use at Thomson Reuters then-current pricing. If Customer reasonably believes that any usage limit, capping, or throttling materially impairs the value or utility of the Service for its intended business purpose, Customer may provide written notice to Thomson Reuters requesting good faith discussions regarding the scope, impact, and potential resolution of the limitation, and the parties shall engage in good faith negotiations for a period of 30 days to explore commercially reasonable alternatives, which may include adjustments to usage limits or charges.

3.3. **License**. Customer grants Thomson Reuters and its Affiliates a license to use, review, and modify Customer Data to (i) provide, test, evaluate, and support the Services (including to investigate reported issues, anomalies, or potential defects through quality assurance, monitoring, or risk assessment measures); and (ii) subject to Section 3.4 below, improve and enhance Thomson Reuters products and services.

3.4. **Tax Return Information.** To the extent any Customer Data constitutes "tax return information" within the meaning of Treasury Regulation § 301.7216-1, Customer acknowledges and agrees that, to the fullest extent permitted without Taxpayer consent under Internal Revenue Code section 7216, Thomson Reuters and its Affiliates may use such tax return information solely to (a) develop, update, test, maintain, secure, and ensure the technical capabilities of the Services used in connection with the preparation or filing of tax returns, including to address changes in IRS forms, e-file specifications, and administrative, regulatory, and legislative guidance; (b) produce statistical compilations of tax return information in support of Thomson Reuters tax return preparation business, including for product improvement, service enhancement, analytics, research, quality assurance, and system optimization; and (c) conduct quality, peer, or conflict reviews to evaluate, monitor, and improve the quality and accuracy of Thomson Reuters tax preparation, accounting, or auditing services.

3.5. **Non-Human Generated Output**. Customer shall not (and shall not permit its Users or any third party to) represent that any Output was human generated.

4. CUSTOMER RESPONSIBILITY

4.1. **Consent**. Customer accepts full responsibility for obtaining any of its Affiliates, Taxpayers, end clients and other third-party consents or authorizations in compliance with Internal Revenue Code Section 7216 and any other applicable law, regulation and licenses, in connection with the provision or Customer's use of the tax preparation or auxiliary services provided within the Services (including the transmission to, or processing, storage or retransmission by, Thomson Reuters or its Service Providers of tax return information.