

Executive Communication to NetFirm CS + VO/SaaS Customer Base

- **DATE:** May 8
 - **TO:** VO/SaaS Designated Product Licensee
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Email subject line:

Thomson Reuters update from Elizabeth Beastrom and Piritta van Rijn

Email body:

Dear Customer,

With the 2024 spring busy season closing in the rearview mirror, we would like to provide you an update on investments we are prioritizing in our tax solutions to further build Thomson Reuters software resilience for the future. We are happy to highlight a few examples of where these investments are supporting the end-to-end Thomson Reuters customer experience:

- **Virtual Office CS/SaaS:** We worked with Citrix experts to review and update the entire Citrix architecture. During peak season this spring, customers benefited from these efforts with a more scalable, stable, and performant Virtual Office CS environment, with improved product and platform stability and performance.
- **NetFirm CS:** We focused our efforts on improving database performance, complete environment observability, and scale testing of our solutions. This calculated mix of improvements provided the product with overall increased reliability and enhanced performance.
- **UltraTax CS:** We upgraded the UltraTax CS e-File Dashboard in-app experience, providing a comprehensive view of all clients' current e-File status with the ability to focus, filter, and search. Also, we launched a new UltraTax.com e-File Dashboard to provide access to all clients' current e-File status anytime, anywhere, on any device. Finally, we implemented several new integration points between UltraTax CS and SurePrep applications to improve the experience.

Our investments also included adding staff, revamping staff onboarding, and updating your self-serve portals. Overall, our efforts reflect our deep commitment to continue providing you with the highest levels of customer service.

Continued investments for our shared future

We value your partnership, and we are committed to sharing next steps as we evolve our solutions to better serve you and your firm. Two key projects include modernizing NetFirm CS and Virtual Office CS/SaaS.

Modernizing NetFirm CS

To support performance during peak demand increases, we recently shifted hosting for the NetFirm CS application from a data center to Microsoft® Azure. During periods of intense work volume, this will provide additional flexibility for us to quickly scale capacity and minimize any impact to your firm as demand increases.

Migrating Virtual Office CS/SaaS

To deliver our customers the benefits of a modern virtual desktop architecture that scales to meet the demands of mission-critical applications, particularly during peak seasons, we launched a Virtual Office CS/SaaS Azure Virtual Desktop (AVD) pilot program in September 2023. Participating firms shifted to actively working in the AVD environment. During peak season this spring, participating firms successfully executed their workflows across Thomson Reuters CS, SurePrep, Onvio, and Microsoft applications.

During the pilot, we collected valuable feedback from participants that informed the improvements we made. The pilot confirmed the benefits of shifting to the new environment, including a scalable solution that leverages a modern, virtual desktop architecture. The pilot also confirmed that this is a reliable way to access Thomson Reuters and Microsoft applications, with the scalability to meet the demands of mission-critical applications, particularly during the peak season. Given the success of the pilot program, over the remainder of the year we anticipate migrating Virtual Office CS/SaaS customers from the current Citrix environment to the new AVD environment. You will hear more about this from our team in the coming weeks.

We are excited to move forward with these initiatives to help us further strengthen our partnership and provide quality customer service.

We are grateful for your ongoing commitment and the trust you put in us.

Thank you.

Elizabeth and Piritta

Elizabeth Beastrom, President, Tax and Accounting Professionals, Thomson Reuters

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