



SERVICE ORDER FORM

Date: TBD

For: <u>Alera Group – [OFFICE NAME]</u> ("Customer")	Quote Expiration Date: <u>TBD</u>
Customer EIN: <u>TBD</u> Affiliation: <u>Alera Group</u>	Proposal: <u>TBD</u> ("Proposal")
Customer Information	Order Form Effective Date: <u>TBD</u>
Address: <u>TBD</u>	Application Url: <u>alera.perfectquote.io</u>
<u>TBD</u>	Subscription Term: <u>TBD</u> months ("Initial Term"); renewal Term(s): <u>12</u> months
Phone: <u>TBD</u>	Payment Terms: <u>Net 15</u> (except as noted below)
Email to Send Invoices: <u>Taylor.Wirth@AleraGroup.com</u>	Payment Frequency: <u>Annual, with Monthly</u>
Implementation Contact: <u>TBD</u>	Payment Method: <u>EFT</u>
Implementation Contact Email: <u>TBD</u>	Referral Partner: <u>N/A</u>

PerfectQuote Software Subscription (the "Subscription")

Item	Start Date	Quantity	Price/User
"Customer License" Type: <u>Flagship</u> Minimum Customer User License Commitment: Additional Customer User Licenses may be added by Customer during the Term at \$ <u>299.00</u> per user per month.	<u>TBD</u>	<u>TBD</u>	<u>\$2,988.00/annual</u>
		Total First Year Annual Subscription Customer User License Fee:	<u>\$TBD</u>

The initial billing for the Minimum Customer User License Commitment shall be invoiced within five (days) after the Order Form Effective Date, and subsequent invoices thereafter based on the identified billing frequency. Notwithstanding the foregoing, starting 30 days after the Order Form Effective Date, Company will review Customer's instance every 30 days ("Review Period") and invoice Customer for the additional number of Customer User Licenses over the Minimum Customer User License Commitment added to Customer's instance during the applicable Review Period at the Monthly Price/User rate (or total number of Customer Licenses, if on a monthly billing cycle). Unless the Subscription is otherwise terminated pursuant to the Master Subscription Terms and Conditions, (i) at each one-year anniversary from the Order Form Effective Date during the Initial Term, Company will invoice Customer, at the identified Payment Frequency, an amount equal to Annual Price/User Rate multiplied by the greater of (x) total number of active Customer Licenses at the conclusion of the final Review Period and (y) Minimum Customer User Licenses Commitment, and (ii) at each renewal Term thereafter, Company will invoice Customer, at the identified Payment Frequency, an amount equal to Annual Price/User Rate multiplied by the total number of active Customer Licenses at the conclusion of the final Review Period. Company shall continue to bill Customer in accordance with its monthly billing policy for each Review Period, as described herein above. Except during an Initial Term, Company reserves the right to modify Price/User/Billing Frequency and Monthly Price/User in accordance with the Master Terms and Conditions.

PerfectQuote Implementation Fees

Item	Quantity	Fee
Setup and Configuration: - Customer instance creation; use of application's standard spreadsheet presentation output - Employer Group data migration (ACA+, Flagship, and Enterprise Licenses only) - Admin user creation - Carrier proposal analysis and development (Flagship and Enterprise Licenses only)	<u>1</u>	<u>\$TBD</u>
Customer On-Boarding Services: - Customer kick-off call - 3 user training sessions		
Total:		<u>\$TBD</u>

Implementation fee shall be invoiced with the initial billing after the Order Form Effective Date.

PerfectQuote Optional Products and Services Fees

Item	Selected	Fee
Post-Implementation Customer Support and Training - Basic (Support Tickets; Open Office Hours/Training; Standard Service Level Agreement)	<input type="checkbox"/>	<u>_____</u>
- Standard (Includes Basic plus Customer-Dedicated Office Hours, and Refresher Courses)	<input checked="" type="checkbox"/>	<u>Included</u>
- Premium (Includes Standard plus Dedicated AM, Periodic Check Ins and Strategy, Enterprise SLA, One-On-One Sessions, Phone Support)	<input type="checkbox"/>	<u>_____</u>



PerfectQuote, Inc.
 PO Box 160084
 Austin, TX 78716

Spreadsheet Converter File "Lite" (Stand-alone macro-enabled file); requires Development Agreement	<input type="checkbox"/>	_____
Custom Spreadsheet Export Development and Support Services (annual); requires Development Agreement	<input type="checkbox"/>	_____
Custom Census Import and Support Services (annual); requires Development Agreement	<input type="checkbox"/>	_____
Third Party API Connection and Annual Support Services (Implementation Fee / Annual Support Fee)		
- Agency CRM: _____	<input type="checkbox"/>	_____
- Benefit Administration: _____	<input type="checkbox"/>	_____
Dedicated Hosting/Server: Approved by Alera Group – National; Service provided at no charge to Customer so long as Alera Group – National subscribes to service	<input checked="" type="checkbox"/>	Included _____
Optional Products/Services Invoice Total		\$TBD _____

Unless otherwise identified herein, the total cost of the selected optional products and services and related Support Services (as identified above) shall be invoiced with the initial invoice. Optional products and services that identify an Annual commitment shall be invoiced on each Renewal Date, subject to termination or change order request provided to Company no later than 30 days prior to a Renewal Date.

Taken together, this Order Form, the Master Subscription Terms and Conditions, and other exhibits, addendums, and schedules, as each may be attached hereto or referenced herein (collectively, the "Subscription Agreement" or "Agreement"), constitute the entire agreement between the parties for the Services and User Licenses provided by the Company here and there under. The Subscription Agreement is entered into in consideration for the specified fees and other obligations as set forth herein. Capitalized terms not otherwise defined in this Offer Form shall be defined elsewhere in the Subscription Agreement and have the same meaning throughout the Subscription Agreement. The terms and conditions specifically identified in this Order Form will prevail over any conflicting term or condition in the Subscription Agreement. The Order Form Effective Date shall be the date that the Order Form is countersigned by the Company.

Is the Customer required to permit access to its Application instance to a third-party/affiliated party as a condition for the Subscription resulting in a parent/child relationship between the party (as the parent) and Customer (as the child) resulting in full Customer Data information rights (Section 9(ii)(d) of Master Subscription Terms and Conditions; requires execution of a Data Sharing Agreement):

Yes Name of Party/Point of Contact Information: _____

Where required by a Carrier, can the Company share Customer Data with the Carrier so as to be able to provide the Customer with B2B rates instead of publicly filed rates for that Carrier (Section 9(ii)(e) of Master Subscription Terms and Conditions):

Yes

Other Subscription Documents: <https://perfectquote.io/pqaleragroupsubscription> Password: [NOT PROVIDED IN SAMPLE ORDER FORM]

Master Subscription Terms and Conditions, v2.04 eff 04/15/2021
 Exceptions Schedule to Master Subscription Terms and Conditions

For Reference Only: <https://perfectquote.io/pqaleragroupsubscription>

PerfectQuote Form W9
 PerfectQuote Vendor Information
 On-boarding/Implementation Commitment Form
 Sample Order Form

PerfectQuote, Inc.

Customer

NOT FOR SIGNATURE

NOT FOR SIGNATURE

 By: TBD
 Title: TBD
 Date: TBD

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 Date: TBD