

Exhibit A - Professional Services Description

Professional Services – PlanAdvisor

- I. Overview.** This service agreement includes services for the Customer's initial implementation of the Hosted Application. Additional components, not listed here, require additional services.
- II. Zywave Team.** The Zywave Team assigned to perform the Professional Services described in the agreement will include a Project Manager, Implementation Consultant, Product Trainer, and Data Analysts.
- III. Duration.** 4 weeks from the Initial Effective Date based on Customer responsiveness and availability.
- IV. Inclusions.** The following services will be provided as part of this agreement.
- a. Initial Setup:**
 - i. Site activation, user setup and core account and contact data load
 - ii. Logo setup
 - b. Training**
 - i. Customer will have access to Zywave University via On Demand and Group Instructor Led curriculum offerings
- V. Exclusions.** The following activities are not included in this Agreement and, if applicable, require an additional service agreement:
- a. Data Services**
 - i. Client-specific data entry
 - b. Training**
 - i. Customized and One on One training
 - ii. On-site training or consulting at Customer or Zywave's physical location
 - iii. Client training
 - c. Data Services:**
 - i. Data import for products not specified within Section IV.
 - ii. Customizations to or additional Third-Party System Integration(s) for Accounts and Plans - functionality and implementation
 - iii. Third-Party System Integration for Commissions -functionality and implementation
 - iv. Implementation of custom integrations leveraging Zywave Web Services
- I. Expiration.** All Professional Services are subject to the Zywave Cancellation Policy available at <https://www.zywave.com/training-cancellation-policy>. Any unused Professional Services Fees will expire 6 months from date of purchase. Any Professional Services performed following such expiration will require an additional Professional Services Fee at Zywave's then-current rates.
- II. Billing.** The Professional Services Fee is due upon execution of this Agreement.
- Zywave will bill Customer for reasonable and actual travel, living expenses (if applicable) and related incidental expenses incurred by Zywave's personnel in rendering the Services.