

			
SECTION: CORPORATE GOVERNANCE Policy Number: EVCM 1.0.0	Organization: Finance	Sponsor: Ryan Siurek	
	Author: Glen Ramirez	Effective Date:	01/Sep/2024
	Owner: VP of Revenue Operations	Revision:	01/Jun/2026
		Version:	2.5
	SUBJECT: Credit Memo Policy		

1. Objective

The purpose of this Credit Memo Policy is to establish the appropriate authorization required to process credit memos issued for Record Keeping and Customer Relation reasons.

2. Scope

This Credit Memo Policy is for Product Lines listed in Appendix A. Subsequent expansion will be rolled out through an amendment to this policy. The VP of Revenue Operations is the policy owner and is responsible for ensuring communication and compliance by each Product Line.

Exceptions to this policy, if any, require written documentation and rationale, which must be approved in writing by the VP, Revenue Operations, CAO or CFO, with documentation maintained for Sarbanes Oxley (SOX).

3. Definitions

The person within the Product Line primarily responsible for the customer relationship.

- Head of CS
- Head of CSM
- Account Manager

4. Policy

4.1 Record Keeping

Invoices may be written as part of normal business operations; in some instances, corrections are required for various situations including errors or administrative matters. These transactions require the approval of the Revenue Operations Manager, or Sr. Mgr. of Tax Reporting and Compliance (in the case of Tax-related issues) per the following matrix.

Record Keeping:	Finance	Business
- Write off balances - 90 days after sent to collections	Mgr - Rev Ops	n/a
- Write off balances - Too small to send to collections	Mgr - Rev Ops	n/a
- Write off balances - Less than 25 dollars	Mgr - Rev Ops	n/a
- Tax corrections	Sr. Mgr of Tax Reporting	n/a

4.2 Customer Relations

Other non-standard adjustments to invoices will require review and approval by the Product Line in addition to the Finance team per the following matrices.

EVERPRO - Non S&A

	Less than \$5,000		\$5,000 to \$14,999		\$15,000 to \$24,999		\$25,000 and Over	
Customer Relations Reasons:	EC - Finance	EverPro	EC - Finance	EverPro	EC - Finance	EverPro	EC - Finance	EverPro
- Customer requests a refund / discount	Mgr - Rev Ops	Head of CS	Mgr - Rev Ops	Head of Cust. Exp.	VP - Rev Ops	Head of Cust. Exp.	CFO	CEO
- Write off for product or service issues	Mgr - Rev Ops	Head of CS	Mgr - Rev Ops	Head of Cust. Exp.	VP - Rev Ops	Head of Cust. Exp.	CFO	CEO
- Other Invoices Disputes	Mgr - Rev Ops	Head of CS	Mgr - Rev Ops	Head of Cust. Exp.	VP - Rev Ops	Head of Cust. Exp.	CFO	CEO

SECURITY & ALARM

	Less than \$5,000		\$5,000 to \$14,999		\$15,000 to \$24,999		\$25,000 and Over	
Customer Relations Reasons:	EC - Finance	EverPro	EC - Finance	EverPro	EC - Finance	EverPro	EC - Finance	EverPro
- Customer requests a refund / discount	Mgr - Rev Ops	Head of CS	Mgr - Rev Ops	Head of S&A	VP - Rev Ops	Head of S&A	CFO	CEO
- Write off for product or service issues	Mgr - Rev Ops	Head of CS	Mgr - Rev Ops	Head of S&A	VP - Rev Ops	Head of S&A	CFO	CEO
- Other Invoices Disputes	Mgr - Rev Ops	Head of CS	Mgr - Rev Ops	Head of S&A	VP - Rev Ops	Head of S&A	CFO	CEO

EVERHEALTH

	Less than \$5,000		\$5,000 to \$14,999		\$15,000 to \$24,999		\$25,000 and Over	
Customer Relations Reasons:	EC - Finance	EverHealth	EC - Finance	EverHealth	EC - Finance	EverHealth	EC - Finance	EverHealth
- Customer requests a refund / discount	Mgr - Rev Ops	Head of CSM	Mgr - Rev Ops	VP of Cust. Exp.	VP - Rev Ops	CRO	CFO	CEO
- Write off for product or service issues	Mgr - Rev Ops	Head of CSM	Mgr - Rev Ops	VP of Cust. Exp.	VP - Rev Ops	CRO	CFO	CEO
- Other Invoices Disputes	Mgr - Rev Ops	Head of CSM	Mgr - Rev Ops	VP of Cust. Exp.	VP - Rev Ops	CRO	CFO	CEO

EVERWELL

	Less than \$1,000		\$1,000 to \$9,999		\$10,000 to \$24,999		\$25,000 and Over	
Customer Relations Reasons:	EC - Finance	EverWell	EC - Finance	EverWell	EC - Finance	EverWell	EC - Finance	EverWell
- Customer requests a refund / discount	Mgr - Rev Ops	Account Mgr.	Mgr - Rev Ops	SVP of Cust. Exp.	VP - Rev Ops	CEO	CFO	CEO
- Write off for product or service issues	Mgr - Rev Ops	Account Mgr.	Mgr - Rev Ops	SVP of Cust. Exp.	VP - Rev Ops	CEO	CFO	CEO
- Other Invoices Disputes	Mgr - Rev Ops	Account Mgr.	Mgr - Rev Ops	SVP of Cust. Exp.	VP - Rev Ops	CEO	CFO	CEO

Please note: Approvers may sign off on any tier below their clip level should the need arise. For example, the CFO may sign off for the VP – Rev Ops should they be unavailable.

4.3 Netting of Credits

All credit memos must be processed as separate transactions and Netting of Credits prior to billing is prohibited. Exceptions to this are listed in Appendix B.

Signature: *Ryan Siurek*
Ryan Siurek (Jun 4, 2026 14:13:57 MDT)

Approved by: Ryan Siurek

Job Title: CFO

Date: 04/06/2026

Appendix A:

Effective September 2, 2025

EverPro:

- Bold Tech
- Briostack
- Customer Lobby
- FieldPoint
- Guild Quality
- Improvel360
- InvoiceSimple
- Joist
- MarketSharp
- PaySimple
- Perennial
- PulseM
- Roofsnap
- Service Fusion
- Service Nation
- SIS
- Studio Director

EverHealth:

- DrChrono Inc.
- Updox
- CollaborateMD
- iSalus

EverWell:

- Timely LTD
- SalonBiz

Appendix B:

- None