



CITY AND COUNTY OF SAN FRANCISCO

OFFICE OF THE CONTROLLER

Ben Rosenfield
Controller

Todd Rydstrom
Deputy Controller

Agreement for Regional Sales and Use Tax Information Services

This Agreement between the City and County of San Francisco ("the City") and MuniServices, LLC ("MuniServices") clarifies the data access and reporting relationship between the two entities.

The City desires access to regional sales tax data analysis services for the purposes of revenue projections and reporting. MuniServices provides such services and maintains the regional database and programs required to deliver the sales and use tax data analyses services, and is willing to provide such services to the City on a "No-Fee" arrangement. Such an agreement is authorized pursuant to California Government Code § 3100, and the City will seek for approval from its legislative body through a resolution to grant MuniServices access to the City's State Board of Equalization sales tax and use tax data to conduct above mentioned services once this Agreement is executed.

Services

MuniServices shall perform the following services:

1. MuniServices will use its database to generate quarterly reports on (1) local and regional trend analyses; (2) significant changes and anomaly analysis; (3) historical perspective analysis; (4) business performance analysis; and others as requested by the City by mutual agreement.
2. MuniServices will meet in person once a year to discuss legislative activity, economic reports and the forecast.
3. MuniServices will provide the City with its five fiscal year sales and use tax forecast annually.

MuniServices agrees the City's Sales and use tax data obtained from the State Board of Equalization will not be used for auditing purposes or any other activities beyond those requested by the City.

Access to Sales & Use Tax Data

The following conditions specified in Section 7056(b)(1) of the State of California Revenue and Taxation Code, which limits the disclosure of confidential taxpayer information contained in the records of the State Board of Equalization, are hereby made part of this agreement.

1. MuniServices is authorized by this Agreement to examine sales or transactions and use tax records of the Board of Equalization provided to the City pursuant to contract under the Bradley-Burns Uniform Sales and Use Tax Law.

2. MuniServices is required to disclose information contained in, or derived from, those sales or transactions and use tax records only to an officer or employee of the City who is authorized by resolution to examine the information.
3. MuniServices is prohibited from performing consulting services for a retailer, as defined in California Revenue & Taxation Code Section 6015, during the term of this agreement.
4. MuniServices is prohibited from retaining the information contained in, or derived from those sales or transactions and use tax records, after this Agreement has expired. Information obtained by examination of the Board of Equalization records shall be used only for purposes related to collection of local sales and use tax or for other governmental functions of the City as set forth by resolution adopted pursuant to Section 7056(b) of the Revenue and Taxation Code. The resolution shall designate MuniServices as a person, authorized to examine sales and use tax records and certify that this Agreement meets the requirements set forth above and in Section 7056(b) (1) of the Revenue and Taxation Code.

All documents, data, survey and reports prepared by MuniServices pursuant to this Agreement shall be considered the property of the City.

City
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San Francisco, CA 64102-4694


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Controller

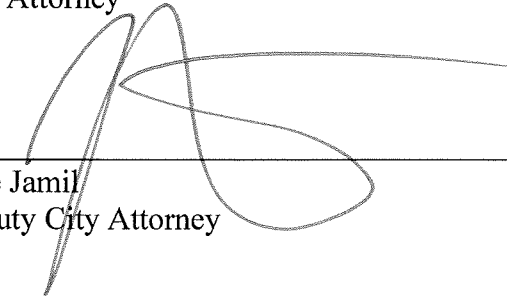
Contractor
MUNISERVICES, LLC

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Doug Jensen
Senior Vice President Client Services

Approved as to Form:

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By: 
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