

## PATENT ASSIGNMENT COVER SHEET

Electronic Version v1.1  
 Stylesheet Version v1.2

EPAS ID: PAT7108464

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|---|--|
| <b>SUBMISSION TYPE:</b>   | NEW ASSIGNMENT   |
| <b>NATURE OF CONVEYANCE:</b>  | ASSIGNMENT   |
| <b>CONVEYING PARTY DATA</b>   |  |
| <b>Name</b>   | <b>Execution Date</b>  |
| JUSTIN RUI CHANG CHIANG   | 12/20/2021   |
| MARIA REGINA VILLANUEVA GARCIA  | 12/20/2021   |
| KEVIN M. MCCLUSKEY  | 05/17/2004   |
| NANKUN HUANG  | 12/20/2021   |
| DAVID ALAN HANEKAMP JR.   | 12/20/2021   |
| EDWARD MILTON RENNER  | 12/20/2021   |
| PETER EDWARD LUBCZYNSKI   | 12/23/2021   |
| MATTHEW ALLEN BRINCHO   | 12/20/2021   |
| TRACY FUNG  | 12/20/2021   |
| <b>RECEIVING PARTY DATA</b>   |  |
| <b>Name:</b>  | INTUIT INC.  |
| <b>Street Address:</b>  | 2700 COAST AVENUE  |
| <b>City:</b>  | MOUNTAIN VIEW  |
| <b>State/Country:</b>   | CALIFORNIA   |
| <b>Postal Code:</b>   | 94043  |
| <b>PROPERTY NUMBERS Total: 1</b>  |  |
| <b>Property Type</b>  | <b>Number</b>  |
| Application Number:   | 17242069   |
| <b>CORRESPONDENCE DATA</b>  |  |
| <b>Fax Number:</b>  | (713)623-4846  |
| <i>Correspondence will be sent to the e-mail address first; if that is unsuccessful, it will be sent using a fax number, if provided; if that is unsuccessful, it will be sent via US Mail.</i> |  |
| <b>Phone:</b>   | 713.623.4844   |
| <b>Email:</b>   | PSDocketing@pattersonsheridan.com,<br>jmunoz@pattersonsheridan.com |
| <b>Correspondent Name:</b>  | PATTERSON + SHERIDAN, LLP - INTUIT INC.                            |
| <b>Address Line 1:</b>  | 24 GREENWAY PLAZA, SUITE 1600                                      |
| <b>Address Line 4:</b>  | HOUSTON, TEXAS 77046   |
| <b>ATTORNEY DOCKET NUMBER:</b>  | INTU/0430USP01   |
| <b>NAME OF SUBMITTER:</b>   | B. TODD PATTERSON  |

|  |                     |
|--|---------------------|
| <b>SIGNATURE:</b>  | /B. TODD PATTERSON/ |
| <b>DATE SIGNED:</b>  | 01/06/2022          |
| <b>Total Attachments: 9</b><br>source=INTU0430USP01_ASSIGNMENT#page1.tif<br>source=INTU0430USP01_ASSIGNMENT#page2.tif<br>source=INTU0430USP01_ASSIGNMENT#page3.tif<br>source=INTU0430USP01_ASSIGNMENT#page4.tif<br>source=INTU0430USP01_ASSIGNMENT#page5.tif<br>source=INTU0430USP01_ASSIGNMENT#page6.tif<br>source=INTU0430USP01_ASSIGNMENT#page7.tif<br>source=INTU0430USP01_ASSIGNMENT#page8.tif<br>source=INTU0430USP01_ASSIGNMENT#page9.tif |                     |

**ASSIGNMENT FOR APPLICATION FOR PATENT**

WHEREAS:

Names and Addresses of Inventors:

|    |   |    |   |
|----|---|----|---|
| 1) | Justin Rui Chang CHIANG<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043  | 2) | Maria Regina VILLANUEVA GARCIA<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043 |
| 3) | Kevin M. MCCLUSKEY<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043       | 4) | Nankun HUANG<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043                   |
| 5) | David Alan HANEKAMP, Jr.<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043 | 6) | Edward Milton RENNER<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043           |
| 7) | Peter Edward LUBCZYNSKI<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043  | 8) | Matthew Allen BRINCHO<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043          |
| 9) | Tracy FUNG<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043               |    |   |

(hereinafter referred to as Assignors), have invented a certain invention entitled:

**KNOWLEDGE ENGINE AUTO-GENERATION OF GUIDED FLOW EXPERIENCE**

for which application for Letters Patent in the United States was filed on April 27, 2021, under Serial No. 17/242,069; and

WHEREAS, INTUIT INC., a corporation of the State of Delaware, having a place of business at 2700 Coast Avenue, Mountain View, California 94043 (hereinafter referred to as Assignee), is desirous of acquiring the entire right, title and interest in and to said application (hereinafter referred to as Application), and the invention disclosed therein (hereinafter referred to as Invention), and in and to all embodiments of the Invention, heretofore conceived, made or discovered by said Assignors, and in and to any and all patents, inventor's certificates and other forms of protection (hereinafter referred to as Patents) thereon granted in any and all countries and groups of countries.

NOW, THEREFORE, in consideration of good and valuable consideration acknowledged by said Assignors to have been received in full from said Assignee:

1. Said Assignors hereby sell, assign, transfer and convey to Assignee the full and exclusive right, title and interest (a) in and to said Application and said Invention; (b) in and to all rights to apply for patents on said Invention in any and all countries pursuant to the International Convention for the Protection of Industrial Property or otherwise; (c) in and to any and all Applications filed and any and all Patents granted on said Invention in any and all countries and groups of countries, including each and every Application filed and each and every Patent granted on any application which is a conventional, division, substitution, or continuation of said Application; and (d) in and to each and every

reissue or extension of any of said Patents.

2. Said Assignors hereby covenant and agree to cooperate with said Assignee to enable said Assignee to enjoy to the fullest extent the right, title and interest to said Invention herein conveyed in any and all countries and groups of countries. Such cooperation by said Assignors shall include prompt production of pertinent facts and documents, giving testimony, execution of petitions, oaths, specifications, declarations or other papers, and other assistance all to the extent deemed necessary or desirable by said Assignee (a) for perfecting in said Assignee the right, title and interest herein conveyed; (b) for prosecuting any of said applications; (c) for filing and prosecuting substitute, conventional, divisional, continuing or additional applications covering said Invention; (d) for filing and prosecuting applications for reissuance of any of said Patents; (e) for interference or other priority proceedings involving said Invention; and (f) for legal proceedings involving said Invention and any application therefore and any Patents granted thereon, including without limitation opposition proceedings, cancellation proceedings, priority contests, public use proceedings, infringement actions and court actions; provided, however, that the expense incurred by said Assignors in providing such cooperation shall be paid for by said Assignee.

3. The term and covenants of this agreement shall inure to the benefit of said Assignee, its successors, assigns and other legal representatives, and shall be binding upon said Assignors, their respective heirs, legal representatives and assigns.

4. Said Assignors hereby warrant and represent that they have not entered and will not enter into any assignment, contract, or understanding in conflict herewith.

IN WITNESS WHEREOF, the said Assignors have executed and delivered this instrument to said Assignee on the dates indicated below.

|    |                            |  |
|----|----------------------------|--|
| 1) | <u>Dec 20, 2021</u> (DATE) | <u><i>Justin R. Chiang</i></u><br><small>Justin R. Chiang (Dec 20, 2021 14:06 PST)</small><br>Justin Rui Chang CHIANG                    |
| 2) | <u>Dec 20, 2021</u> (DATE) | <u><i>Maria Regina Garcia</i></u><br><small>Maria Regina Garcia (Dec 20, 2021 14:06 PST)</small><br>Maria Regina VILLANUEVA GARCIA       |
| 3) | _____ (DATE)               | <u><i>/</i></u><br>Kevin M. MCCLUSKEY  |
| 4) | <u>Dec 20, 2021</u> (DATE) | <u><i>Nankun Huang</i></u><br><small>Nankun Huang (Dec 20, 2021 14:13 PST)</small><br>Nankun HUANG                                       |
| 5) | <u>Dec 20, 2021</u> (DATE) | <u><i>David Alan Haneckamp, Jr.</i></u><br><small>David Alan Haneckamp, Jr. (Dec 20, 2021 14:23 PST)</small><br>David Alan HANEKAMP, Jr. |
| 6) | <u>Dec 20, 2021</u> (DATE) | <u><i>Edward Milton Renner</i></u><br><small>Edward Milton Renner (Dec 20, 2021 14:13 PST)</small><br>Edward Milton RENNER               |

7) Dec 23, 2021 (DATE)

Peter Edward Lubczynski  
Peter Edward Lubczynski (Dec 23, 2021 08:14 PST)  
Peter Edward LUBCZYNSKI

8) \_\_\_\_\_ (DATE)

/ \_\_\_\_\_ /  
Matthew Allen BRINCHO

9) \_\_\_\_\_ (DATE)

/ \_\_\_\_\_ /  
Tracy FUNG

**ASSIGNMENT FOR APPLICATION FOR PATENT**

WHEREAS:

Names and Addresses of Inventors:

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| 1) | Justin Rui Chang CHIANG<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043  | 2) | Maria Regina VILLANUEVA GARCIA<br>c/o Intuit Inc.<br>2700 Coast Avenue<br>Mountain View, California 94043 |
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reissue or extension of any of said Patents.

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IN WITNESS WHEREOF, the said Assignors have executed and delivered this instrument to said Assignee on the dates indicated below.

1) \_\_\_\_\_ (DATE) / \_\_\_\_\_  
Justin Rui Chang CHIANG

2) \_\_\_\_\_ (DATE) / \_\_\_\_\_  
Maria Regina VILLANUEVA GARCIA

3) \_\_\_\_\_ (DATE) / \_\_\_\_\_  
Kevin M. MCCLUSKEY

4) \_\_\_\_\_ (DATE) / \_\_\_\_\_  
Nankun HUANG

5) \_\_\_\_\_ (DATE) / \_\_\_\_\_  
David Alan HANEKAMP, Jr.

6) \_\_\_\_\_ (DATE) / \_\_\_\_\_  
Edward Milton RENNER

- 7) \_\_\_\_\_ (DATE) 1  
Peter Edward LUBCZYNSKI
- 8) Dec 20, 2021 \_\_\_\_\_ (DATE) Matthew Allen Brincho  
Matthew Allen Brincho (Dec 20, 2021 14:02 PST)  
Matthew Allen BRINCHO
- 9) Dec 20, 2021 \_\_\_\_\_ (DATE) Tracy Fung  
Tracy Fung (Dec 20, 2021 16:00 PST)  
Tracy FUNG



## **EMPLOYEE INVENTION ASSIGNMENT AND CONFIDENTIALITY AGREEMENT**

1. I understand that Intuit Inc. (the "Company") is engaged in a continuous program of research, development, production and marketing in connection with its business and that it is critical for the Company to preserve and protect its Proprietary Information (as defined below), its rights in Inventions (as defined below) and in all related intellectual property rights (collectively referred to as "Intellectual Property"). Accordingly, I am entering into this agreement as a condition of my employment with the Company, whether or not I am expected to create inventions of value for the Company.

2. I understand that during the course of my employment with the Company it is likely I will gain access to information of a confidential or secret nature, including but not limited to Inventions (as defined below), marketing plans, product plans, business strategies, financial information, forecasts, personnel information, customer lists, and trade secrets ("Proprietary Information"). Such information may relate to the business of the Company or to the business of any subsidiary, affiliate or any party with whom the Company is bound to hold information of such party confidential.

3. I agree that, at all times, both during my employment and after I leave the Company, I will keep and hold any Proprietary Information in strict confidence and trust, and I will not use or disclose any Proprietary Information without first receiving the Company's express written consent, except if compelled by government or court order to do so. Upon leaving the Company, I will promptly give to the Company all documents, materials or property in my possession related to the Company. I will not take with me any property or copies of my work or Company related documents and materials that I have received or used, including Proprietary Information.

4. During the course of my employment, I agree to promptly disclose in confidence to the Company all inventions, improvements, designs, original works of authorship, formulas, processes, compositions of matter, computer software programs, databases, mask works and trade secrets ("Inventions") that I make or conceive or first reduce to practice or create, either alone or jointly with others, whether or not in the course of my employment, and whether or not such Inventions are patentable, copyrightable or protectible as trade secrets.

5. I understand that, under the copyright laws, any copyrightable works prepared by me within the course and scope of my employment are "works for hire". Consequently, the Company will be considered the author and owner of such works.

6. I agree that all Inventions that (a) are developed using equipment, supplies, facilities, or trade secrets of the Company, (b) result from work performed by me for the Company, or (c) relate to the Company's business or current or anticipated research and development, will be the sole and exclusive property of the Company. I hereby assign and agree to transfer to the Company any and all rights that I may have in any such Inventions and in any associated Intellectual Property.

7. I also waive and agree never to assert any "Moral Rights" I might have in or with respect to any Invention even after I leave the Company. Moral Rights means any right (or similar right existing under the judicial or statutory law of any country or treaty) to claim authorship of any Invention, to object or prevent modification of any Invention, or to withdraw from circulation or to control the publication or distribution of any Invention.

8. I agree to assist the Company in every proper way to obtain and enforce the intellectual property protection for any Intellectual Property in any and all countries. I will sign documents that the Company may reasonably request to obtain such protection. My obligations under this paragraph will continue even after I leave the Company, provided the Company will reimburse me at a reasonable rate after I leave the Company for time or expenses actually spent by me on its behalf.

9. I understand that my employment with the Company requires my undivided attention and effort. As a result, during my employment, I will not, without the company's express written consent, engage in any other employment or business that (i) directly or indirectly competes with the current or future business of the Company; (ii) uses any Company information, equipment, supplies, facilities or materials; or (iii) otherwise interferes or conflicts in any way with my employment with the Company.

10. During my employment with the Company and for a period of one (1) year thereafter, I will not directly or indirectly solicit away employees or consultants of the Company for my own benefit or for the benefit of any other person or entity.

11. During my employment with the Company and after termination of my employment, I will not directly or indirectly solicit or take away suppliers or customers of the Company if the identity of the supplier or customer or information about the supplier or customer relationship is a trade secret or is otherwise deemed confidential information within the meaning of California law.

12. I agree and authorize the Company to use, reuse, and grant others the right to use and reuse, both during and after my employment, my name, photograph, likeness (including caricature), voice, and biographical information, and any reproduction or simulation thereof, in any current or future media (including but not limited to film, video and digital or other electronic media) in connection with any promotion, marketing or advertising of the Company or its products or services.

13. I represent that my performance of all the terms of this agreement and my responsibilities as an employee of the Company will not breach any invention assignment/proprietary information agreement with any former employer or other party and that will not use or disclose any trade secrets or proprietary information from any former employer or third party in the course of my employment with the Company. I also represent that I will not bring with me to the Company or use in the performance of my responsibilities for the Company any property of a former employer that would not generally be available to the public or have not been legally transferred to the Company. I hereby authorize the Company to notify, after I leave the Company, my employer or future employer of the terms of this Agreement and my responsibilities detailed in this agreement.

14. I understand that any breach or threatened breach of this agreement by me will likely result in irreparable harm and the Company will be entitled to injunctive relief to enforce this agreement and shall have the right to recover the reasonable attorney's fees and court costs expended in connection with any litigation instituted to enforce this agreement

15. This agreement will be governed and interpreted in accordance with the internal laws of the State of California, without regard to or application of choice of law rules or principles. In the event that any provision of this agreement is found by a court or other competent tribunal to be illegal, invalid or unenforceable, then that provision will not be voided but enforced to the maximum extent allowed, and the remainder of the agreement will remain in full force and effect.

16. I have been notified and understand that certain Inventions may be excepted from this agreement if it qualifies fully under the provisions of Section 2870 of the California Labor Code, which states as follows:

ANY PROVISION IN AN EMPLOYMENT AGREEMENT WHICH PROVIDES THAT AN EMPLOYEE SHALL ASSIGN, OR OFFER TO ASSIGN, ANY OF HIS OR HER RIGHTS IN AN INVENTION TO HIS OR HER EMPLOYER SHALL NOT APPLY TO AN INVENTION THAT THE EMPLOYEE DEVELOPED ENTIRELY ON HIS OR HER OWN TIME WITHOUT USING THE EMPLOYER'S EQUIPMENT, SUPPLIES, FACILITIES, OR TRADE SECRET INFORMATION EXCEPT FOR THOSE INVENTIONS THAT EITHER: (1) RELATE AT THE TIME OF CONCEPTION OR REDUCTION TO PRACTICE OF THE INVENTION TO THE EMPLOYER'S BUSINESS, OR ACTUALLY OR DEMONSTRABLY ANTICIPATED RESEARCH OR DEVELOPMENT OF THE EMPLOYER, OR (2) RESULT FROM ANY WORK PERFORMED BY THE EMPLOYEE FOR THE EMPLOYER. TO THE EXTENT A PROVISION IN AN EMPLOYMENT AGREEMENT PURPORTS TO REQUIRE AN EMPLOYEE TO ASSIGN AN INVENTION OTHERWISE EXCLUDED FROM BEING REQUIRED TO BE ASSIGNED UNDER CALIFORNIA LABOR CODE SECTION 2870(a), THE PROVISION IS AGAINST THE PUBLIC POLICY OF THIS STATE AND IS UNENFORCEABLE.

17. I understand that this agreement does not constitute an employment contract or obligate the Company to employ me for any period of time. I understand that my employment with the Company is at will and may be terminated by the Company at any time and for any reason, with or without notice. This agreement will be effective as of the first day of my employment by the Company which will be May 17, 2009.

Intuit Inc.:

Employee:

By: \_\_\_\_\_

By: Ken McCluskey

Name: \_\_\_\_\_

Name: Ken McCluskey

Title: \_\_\_\_\_