

**CERTIFICATIONS: (bank product customers only)**

By signing this Application, you, the Primary Applicant (and Joint Applicant if applicable), hereby certify:

1. The information you have provided for your tax preparation is true and accurate.
2. You are at least eighteen (18) years old (or older as required by applicable state law), and have presented to Tax Preparer one of the following valid forms of Picture ID: Driver’s License, BMV/DMV State ID, Military ID, Passport, Resident Alien ID, or other Government-Issued Picture ID.
3. Your fee will be deducted from your taxes. You understand that the Refund Disbursement Service is (i) an optional product offered in exchange for payment of a fee, (ii) not a loan or extension of credit, and (iii) not required in order to file your taxes or receive a tax refund.
4. You understand the IRS uses refunds to cover overdue taxes and notifies you when this occurs. The Fiscal Service offsets refunds through the Treasury Offset Program to cover past due child support, federal agency non-tax debts such as student loans and state income tax obligations. Fiscal Service sends you an offset notice if it applies your refund or part of your refund to non-tax debts. If you have questions about the offset, contact the agency identified in the notice. You may also call the Treasury Offset Program Call Center at 1-800-304-3107, if you have additional questions.
5. In the event your entire refund is intercepted to settle a Treasury Offset Program debt you understand your tax preparer fee was not collected by us and you agree to pay your tax preparer within 30 days of email, phone, fax, or regular mail notification by preparer or company. Send payments to Tax Notary Express, 12135 Walden Woods Dr, Orlando, FL 32826.
6. You understand and agree outstanding fees over 30 days will be sent to claims court and you agree to pay the original fee plus \$10 dollars monthly interest fees, collection fees, attorney fees, court fees, summon fees, and postage fees which may exceed three times your initial preparation fee. You further agree to garnishment action for recovery of any and all applicable fees to facilitate payment collection.
7. You understand Tax Notary Express accepts payments via check, credit card, cash app, and google pay for your convenience.
8. You received a completed copy of this Application and Agreement, and you have carefully read and considered all the provisions of the Application and Agreement.
9. You have received a complete copy of your tax return and understand future paper copies are available at \$15 for hard copies and \$10 for email or PDF copy.
10. You agree that the “Expected Refund Amount,” “Authorized Fees and Payments Disbursed from Refund,” “Estimated Total Deductions,” and “Estimated Refund Amount Paid to You” are good faith estimates based upon the amount of your tax return filings.
11. You authorize that we make each disbursement specified on the “Authorized Fees and Payments Disbursed from Refund” prior disbursing the remaining proceeds to you.
12. You have selected the disbursement option above to receive the remaining proceeds from your tax return(s), if any.
13. You have authorized your tax preparer to submit this Application on your behalf.
14. You have read, understand, and agree to all of the terms of this Application and Agreement, including the WAIVER OF RIGHT TO TRIAL BY JURY AND ARBITRATION PROVISION.
15. You understand and agree to be bound by all terms contained herein.

Printed Primary Tax Payer	Date	Printed Spouse	Date
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Primary Tax Payer	Date	Spouse	Date
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(Joint Applicant Signature required if filing joint return.)

**USA PATRIOT ACT DISCLOSURE:** IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT: In an effort to protect you and our country, the USA PATRIOT Act was signed into law. To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens a new account. As such, we ask for your name, address, date of birth, and other information that will allow us to identify you. We may ask for a driver’s license or other identifying documents. We will share certain of this information with third parties as necessary to fulfill our obligations and as disclosed in this Application and Agreement.

**For questions, complaints, and concerns, call toll free at 888-782-0860.**