

CERTIFICATIONS: (PREPAID 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. 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.
4. In the event your entire refund is intercepted to settle a Treasury Offset Program debt the IRS will send you a letter explaining the details.
5. In the event your payment method is rejected you understand and acknowledge an additional \$25 fee will be added to your prep fee.
6. You agree to pay your tax preparer within 30 days of email, phone, or fax notification by preparer or company regarding any rejected payment notifications. Send certified check or money order **plus \$25 rejection fee** to Tax Notary Express, 12135 Walden Woods Dr, Orlando FL 32826.
7. You understand and acknowledge 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 all applicable fees to facilitate payment collection.
8. 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.
9. You may track your refund status at www.irs.gov or phone app IRS2GO.
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 disbursement specified by your banking info if direct deposit, or check in the mail if no direct deposit was provided.
12. If bank info was provided, you have verified the account number and direct deposit information is accurate and correct as displayed on your current tax return.
13. You have authorized your tax preparer to transmit your tax paperwork to the IRS by e-file if available.
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
Primary Tax Payer	Date	Spouse	Date

(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.