

Effective date: October 22, 2026 | Last updated: October 22, 2026

Summary: By opting in, you agree to receive text messages from RP Tax Service about appointments, document requests, your tax return, and replies to your questions. Message frequency varies. Message and data rates may apply. Reply **STOP** to opt out at any time. Reply **HELP** for help. Consent is not a condition of receiving services. Mobile information will not be shared with third parties or affiliates for marketing or promotional purposes.

1. Acceptance of Terms

These SMS Terms & Conditions (the "Terms") govern the text message program (the "Program") offered by RP Tax Service ("RP Tax Service," "we," "us," or "our"). By opting in to receive text messages from us, you ("you" or "your") acknowledge that you have read, understood, and agree to be bound by these Terms and by our Privacy Policy, which is incorporated into these Terms by reference. If you do not agree to these Terms, do not opt in to the Program.

2. Eligibility

You must be at least 18 years of age and the account holder or authorized user of the mobile telephone number you provide. By opting in, you represent that you meet these requirements and that you are authorized to consent to receive text messages at that number.

3. Program Description

The Program provides informational and customer care text messages related to the services you request from RP Tax Service, which may include:

- Appointment confirmations, reminders, and scheduling updates;
- Requests to upload tax documents to our secure client portal;
- Notifications that your tax return or other documents are ready for review or signature;
- Notices about deadlines, missing information, or invoices related to your services; and
- Responses to questions you send us about our office hours, location, and services.

We do not send marketing or promotional text messages through this Program.

4. Consent to Receive Text Messages

By opting in, you expressly consent to receive recurring text messages from RP Tax Service at the mobile number you provided, including messages sent using automated technology. You may opt in by (a) texting our office number, (b) giving verbal consent to our staff during a phone call or office visit, or (c) checking the SMS consent box on the RP Tax Service Text Message (SMS) Consent Form. **Consent to receive text messages is not a condition of purchasing or receiving tax preparation or any other goods or services from RP Tax Service.**

5. Message Frequency

Message frequency varies based on your appointments, the status of your tax return, and the messages you send us.

6. Message and Data Rates

Message and data rates may apply to each text message sent or received, according to your mobile carrier's plan. RP Tax Service does not charge for Program messages. Please contact your mobile carrier for details about your plan.

7. How to Opt Out

You may cancel the Program at any time. Text **STOP** to any message from RP Tax Service. Other keywords such as **CANCEL**, **END**, **QUIT**, **UNSUBSCRIBE**, or **STOPALL** will also opt you out. After you opt out, you will receive one final message confirming your request, and you will receive no further Program messages unless you opt in again. To resubscribe, text **START** or **UNSTOP**. You may also opt out by contacting us using the information in Section 20.

8. Help

For help, text **HELP** to any message from RP Tax Service, or contact us by email at robertpurcell@rptaxes.com or through our website at www.rptaxes.com.

9. Supported Carriers and Carrier Liability

The Program is available on most major U.S. mobile carriers. Carrier support may change without notice.

Mobile carriers are not liable for delayed or undelivered messages.

10. Changes to Your Mobile Number

If you change, cancel, or transfer your mobile number, you agree to notify us promptly or text STOP from that number before the change so that messages intended for you are not sent to someone else. You are responsible for keeping your contact information current.

11. No Professional Advice by Text Message

Text messages are provided for convenience and general communication only. Text messages do not constitute tax, legal, accounting, or financial advice, and no professional advice will be provided by text message. Tax matters will be discussed by phone, in person, or through our secure client portal.

12. Security of Sensitive Information

Text messaging is not a secure method of communication. **RP Tax Service will never ask you to send, and you agree not to send, your Social Security number, Individual Taxpayer Identification Number, bank or credit card account information, passwords, or tax documents by text message.** Please upload all tax documents only through our secure client portal. If you receive a text message claiming to be from RP Tax Service that requests this information, do not respond and contact our office directly.

13. Automated Assistance

Some messages and replies may be generated or handled by automated systems, including an AI-assisted virtual receptionist, to help answer common questions and schedule appointments. You may ask to speak with a member of our staff at any time.

14. Privacy Policy Statement

Your privacy is important to us. Information collected through the Program, including your mobile number and message content, is used only to provide the Program and the services you request, and is handled in accordance with our Privacy Policy and applicable law governing tax return preparers.

Mobile information will not be shared with third parties or affiliates for marketing or promotional purposes. Text messaging originator opt-in data and consent will not be shared with any third parties. Information may be shared only with service providers that help us deliver the Program (such as our messaging platform provider), who are prohibited from using it for any other purpose, or when required by law. Please see our full Privacy Policy at www.rptaxes.com.

15. Message Delivery and Program Changes

Text message delivery is subject to effective transmission by your mobile carrier and is not guaranteed. Messages may be delayed or not delivered for reasons outside of our control. RP Tax Service may modify, suspend, or discontinue the Program, in whole or in part, at any time without notice. Do not rely on text messages for time-sensitive deadlines; we recommend confirming important dates directly with our office.

16. Disclaimer of Warranties

THE PROGRAM IS PROVIDED "AS IS" AND "AS AVAILABLE." TO THE FULLEST EXTENT PERMITTED BY LAW, RP TAX SERVICE DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT, AND DOES NOT WARRANT THAT MESSAGES WILL BE DELIVERED TIMELY, ERROR-FREE, OR AT ALL.

17. Limitation of Liability

TO THE FULLEST EXTENT PERMITTED BY LAW, RP TAX SERVICE AND ITS OWNERS, EMPLOYEES, AND SERVICE PROVIDERS SHALL NOT BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, OR PUNITIVE DAMAGES ARISING OUT OF OR RELATED TO THE PROGRAM, INCLUDING ANY DELAYED, UNDELIVERED, OR MISDIRECTED MESSAGE. Nothing in these Terms limits any liability that cannot be limited under applicable law.

18. Indemnification

You agree to indemnify and hold harmless RP Tax Service from any claims, losses, or expenses, including reasonable attorneys' fees, arising from your breach of these Terms, your provision of a mobile number you are not authorized to use, or your misuse of the Program.

19. General Terms

Changes to these Terms. We may update these Terms from time to time. The current version will always be posted on our website with its effective date. Your continued participation in the Program after changes are posted means you accept the updated Terms.

Governing law. These Terms are governed by applicable federal law and the laws of the state in which RP Tax Service's principal office is located, without regard to conflict-of-law principles.

Severability. If any provision of these Terms is found unenforceable, the remaining provisions will remain in full force and effect.

Entire agreement. These Terms, together with our Privacy Policy, are the entire agreement between you and RP Tax Service regarding the Program and supersede any prior understandings about it.

20. Contact Us

If you have questions about these Terms or the Program, please contact:

RP Tax Service

Email: robertpurcell@rptaxes.com

Website: www.rptaxes.com