

Client Confirmation Message (Use After Signing)

You can copy-paste this anywhere (text, portal, message system):

“Thank you for signing the Client Service & Payment Agreement. Your acknowledgment has been received. Services will now proceed in accordance with the terms outlined. Please retain a copy for your records.”

this as an **auto-email, portal message, or text** once the agreement is signed.

Subject (if email): Agreement Received – Services Proceeding

Message:

Thank you for signing the Client Service & Payment Agreement with Mz LadyDee Taxes.

Your acknowledgment has been received and recorded. Services will now proceed in accordance with the terms outlined in the agreement. Please retain a copy of your signed documents for your records.

If you have any questions as we move forward, feel free to reach out. We appreciate the opportunity to assist you.

PAST-DUE / NON-PAYMENT NOTICE (COURT-READY)

Use this if payment is **late or missed**.

Subject: Past Due Balance – Immediate Attention Required

Notice:

This notice is to inform you that payment for tax preparation services provided by Mz LadyDee Taxes remains outstanding.

Per the Client Service & Payment Agreement you signed, payment was due within the agreed timeframe. As of today, your account is considered past due.

Please remit payment immediately to avoid further action. Failure to resolve this balance may result in collection efforts and/or legal action to recover fees owed, as outlined in the signed agreement.

If you believe this notice was sent in error or need to discuss payment arrangements, contact us immediately.

FINAL DEMAND NOTICE (LAST STEP BEFORE LEGAL ACTION)

This is the **last notice** before court.

Subject: Final Demand for Payment

Notice:

This letter serves as a final demand for payment regarding unpaid tax preparation services provided by Mz LadyDee Taxes.

Despite prior notice, the balance owed remains unpaid. You are hereby given notice that failure to submit payment within seven (7) days of this communication will result in legal action being initiated to recover the outstanding balance, including applicable court costs and fees, as permitted by law.

This matter can still be resolved by submitting payment immediately.

4 [WEBSITE INTEGRATION CHECKLIST (DO THIS EXACTLY)]

Place items in this order on your website:

BEFORE BOOKING OR PAYMENT

- ✓ Link: “Review & Sign Client Agreement (Required)”
- ✓ Show: Plain-English Summary PDF

REQUIRED CHECKBOX

I acknowledge that I have reviewed and signed the Client Service & Payment Agreement.

(No check = no booking)

PAYMENT BUTTON

Submit Payment Here for Services

FOOTER LINE (IMPORTANT)

All services are subject to signed agreement. Fees apply once work begins.

5 [OPTIONAL PAYMENT-ARRANGEMENT ADDENDUM]

Use ONLY if you approve a payment plan.

Payment arrangements are granted at the discretion of Mz LadyDee Taxes. Failure to comply with any agreed payment schedule constitutes default and may result in immediate legal action to recover all fees owed.

Client Initials: _____

1 [CLIENT INTAKE CHECKLIST (PDF OR ONLINE FORM)]

Mz LadyDee Taxes – Client Intake Checklist

Please review and confirm that all required items are submitted before services begin.

- Government-issued photo ID
- Social Security card(s) or ITIN documentation
- Prior-year tax return (if available)
- All W-2s, 1099s, and income documents
- Bank account and routing number for direct deposit
- Documentation for dependents (if applicable)
- Health insurance documentation (if applicable)
- Signed **Client Service & Payment Agreement**
- Signed **Tax Return Summary, Service Fees & Authorization**

Client Initials: _____

Date Submitted: _____

Services will not begin until all required documents and agreements are received.

□ 2 RETURN ACCEPTED NOTICE (CLIENT RECORD DOCUMENT)

Tax Return Acceptance Confirmation

This document confirms that the Client's tax return has been successfully filed and **accepted** by the IRS and/or applicable state taxing authority.

- **IRS Acceptance Date:** _____
- **State Acceptance Date:** _____
- **Tax Year Filed:** _____

The Client acknowledges that IRS acceptance constitutes **completion of tax preparation services**.

If service fees were not deducted from the refund, payment is due **within seven (7) calendar days** of acceptance or as otherwise stated in the signed agreement.

Client Initials: _____

Date: _____

□ 3 REFUND DELAY / NO REFUND EXPLANATION (PDF HANDOUT)

Important Information Regarding Refund Delays or Denials

Refunds are issued by the IRS and state taxing authorities — **not by Mz LadyDee Taxes.**

Please be advised:

- Refunds may be delayed due to IRS review, verification, offsets, prior debts, identity confirmation, or processing backlogs.
- Refunds may be reduced or denied for reasons beyond the preparer's control.
- **Refund delays or denials do not eliminate responsibility for service fees.**

All tax preparation and filing fees remain **due and payable** in accordance with the signed Client Service & Payment Agreement, regardless of refund outcome.

Client Initials: _____

Date: _____

4 ARKANSAS-SPECIFIC ADDENDUM (ATTACH TO AGREEMENT)

Arkansas Client Legal Addendum

This addendum applies to clients filing tax returns within the State of Arkansas.

The Client acknowledges that:

- This agreement is governed by the laws of the **State of Arkansas**
- Any legal action arising from non-payment or breach of agreement may be filed in the appropriate **Arkansas state court**
- The Client consents to jurisdiction and venue within the State of Arkansas

This addendum is incorporated into and made part of the Client Service & Payment Agreement.

Client Initials: _____

Date: _____

CLIENT WELCOME PACKET (PDF – GIVEN AFTER SIGNING)

Welcome to Mz LadyDee Taxes

Thank you for choosing **Mz LadyDee Taxes** for your tax preparation needs. We appreciate the trust you have placed in our services and look forward to working with you.

Our goal is to provide accurate, professional, and timely tax services while maintaining clear communication and expectations throughout the process.

What to Expect

- Professional tax preparation and filing services
- Clear communication regarding your return
- Transparency regarding fees and timelines
- Secure handling of your personal information

Important Reminders

- Tax preparation services are **not free**
- Refunds are **not guaranteed**
- Service fees are earned once work begins
- IRS acceptance marks completion of services
- Payment deadlines are strictly enforced

Contact & Office Hours

Business Hours:

Monday–Friday | 10:30 AM – 5:30 PM

Saturday: By Appointment Only

Website: **www.mzladydeetaxes.com**

Office Phone: **501-646-0781**

Remember: You're not just a number here — you're family.

□ 2 PAYMENT PLAN AGREEMENT (USE ONLY IF YOU APPROVE ONE)

Mz LadyDee Taxes – Payment Arrangement Agreement

This Payment Arrangement Agreement is entered into between **Mz LadyDee Taxes** and the undersigned Client.

The Client acknowledges that:

- A balance is owed for tax preparation services rendered
- A payment arrangement is granted as a **courtesy**, not an obligation

Payment Terms

- Total Amount Owed: \$_____
- Payment Schedule: _____
- First Payment Due: _____

Default Clause

The Client understands and agrees that:

- **Any missed or late payment constitutes default**
- Upon default, the full remaining balance becomes **immediately due**
- Mz LadyDee Taxes may pursue **legal action without further notice**

Client Initials: _____

Client Signature: _____

Date: _____

3 COURT-READY AFFIDAVIT (USED IF YOU FILE SUIT)

Affidavit of Services Rendered & Non-Payment

I, **Mz LadyDee**, owner of **Mz LadyDee Taxes**, affirm under oath the following:

1. Tax preparation services were provided to the Client
2. The Client signed a Service & Payment Agreement
3. Services were completed upon IRS acceptance
4. Payment remains unpaid despite written notice
5. The balance owed is \$_____

This affidavit is submitted in support of legal action to recover fees owed.

Signed: _____

Date: _____

□ 4 CLIENT DECLINED TO PROCEED ACKNOWLEDGMENT

Notice of Client Decision Not to Proceed

The Client acknowledges that:

- Mz LadyDee Taxes began work on the tax return
- The Client has chosen not to proceed with filing
- A minimum service fee remains due for services rendered

Amount Due: **\$150 minimum or agreed service fee**

Client Initials: _____

Client Signature: _____

Date: _____