



Authorization for Credit Card Use

COMPLETE THIS AUTHORIZATION AND RETURN

All information will remain confidential

Name on Card: _____

Billing Address: _____

City, State and Zip: _____

Credit Card Type: Visa Mastercard Discover AMEX

Credit Card Number: _____

Expiration Date: _____

Card Identification Number: _____ (3 or 4-digit code located on the front or back of the credit card)

I authorize David York's Tax Service, Inc. to use this credit card to pay for consultation appointments, Individual and Business Tax Preparation, Bookkeeping Service and Payroll Services. We may charge you an insufficient fund fee, up to the maximum rate allowed by law, if your payment is dishonored. In addition to our right to assess late payment fees, interest, and any other costs arising from our expenses to recover amounts you owe us if your payment is not made by the due date on your invoice, we may begin procedures to cancel services. You will be informed of such action if required by law. If you have any questions about your invoice or dispute a charge, please contact us. Except as otherwise provided by applicable law, you must notify David York's Tax Service, Inc. of any disputes concerning any charges within 30 days after the date of your invoice or credit card charge. You accept all charges not disputed within 30 days. To dispute a charge on your invoice, you must follow the dispute procedures described in the

"Dispute Resolution" section of this Agreement. **If you have read & agree, please initial**

Cardholder – Please Sign and Date

Signature: _____

Date: _____

Print Name: _____

Return the completed and signed form by email or mail to the following:

David York's Tax Service, Inc.
7860 Mission Center Court, Ste #107
San Diego, CA 92108
619-684-5005
Taxes@DavidYorksTaxService.com

DISPUTE RESOLUTION POLICY

Dispute Process: Most concerns can be resolved quickly and to your satisfaction by contacting David York's Tax Service, Inc. If David York's Tax Service, Inc. is unable to resolve a complaint you may have to your satisfaction or if David York's Tax Service, Inc. has not been able to resolve a dispute it has with you after attempting to do so informally, then we each agree to resolve those disputes through binding arbitration or small claims court, instead of in courts of general jurisdiction.

REFUND POLICY

Refund Policy: All services rendered by David York's Tax Service, Inc. are provided on a non-refundable basis. This includes, but it not limited to, setup fees, monthly fees, upgrade fees, professional services fees, and tax preparation fees. Customer agrees not to charge back any credit card payments for services rendered. In the event that a customer files a charge back or other payment dispute, they will be considered to be in violation of this agreement and may be subject to collection action.

APPOINTMENT DEPOSIT & CANCELLATION POLICY

A \$100.00 non-refundable deposit is required for all appointments at the time of scheduling to confirm and hold your appointment. The deposit will be applied to your balance due at the end of your appointment. *Appointments without a deposit will be cancelled within 24 hours of scheduling.

CANCELLATION POLICY

We ask for at least 48 hours notice (email is preferred), as a courtesy, if you will need to cancel or reschedule your appointment. We are more than happy to reschedule your appointment and apply your deposit towards a future appointment if you give at least 48 hours notice. We understand that unplanned circumstances can occur and you may need to cancel or reschedule your appointment. If you reschedule or cancel your appointment less than 48 hours prior to your appointment time your deposit is non-refundable and a new deposit will be required to book any future appointment.

I have read and agree to the above policies

(Initials)