PRIVATE PROTECTION AGREEMENT & FEE DEDUCTION AUTHORIZATION

This Private Protection Agreement and Fee Deduction Authorization ("Agreement") is entered into by and between the undersigned client ("Client," "you") and Dynamic Tax Services USA, LLC ("Firm," "we", "us"), a tax preparation firm providing remote tax preparation, compliance, and electronic filing services. By signing below, you acknowledge and agree to the legally binding terms, protection shields, and financial authorizations detailed herein.

I. FIRM'S PROTECTION, LIABILITIES & LIABILITY SHIELD

i. Accuracy and Completeness of Information:

The firm prepares tax returns solely based on information and documentation provided directly by the Client through secure channels. The Firm does not audit or independently verify this data. The Client bears full responsibility for the truthfulness, completeness, and legality of all information submitted.

ii. Ultimate Taxpayer Responsibility:

By law, the accuracy of a tax return is the sole responsibility of the taxpayer. The Firm functions as a preparer and e-filing agent only. By signing or digitally authenticating IRS Form 8879 (IRS e-file Signature Authorization), the Client confirms full review and approval of the return's contents.

iii. Absolute Limitation of Liability:

To the extent permitted by law, the Firm's maximum liability for any error, omission, or issue arising from services rendered under this Agreement is strictly limited to the total tax preparation and filing fee paid by the Client for the specific tax year. The Firm is not liable for any indirect, incidental, or consequential damages, including lost refunds, interest, or penalties.

Phone: (386) 248.5467 Email: thedynamictaxservices@gmail.com Website: *dynamictaxservices.org*

iv. Audit, Subpoena, and Examination Defense:

This agreement does not include audit defense or representation unless separately contracted in writing. An IRS or state inquiry does not necessarily indicate Firm error or responsibility.

II. REMOTE WORKFLOW, SECURITY & PRIVACY STATMENTS

i. GLBA & FTC Safeguards Rule Compliance:

The Firm maintains administrative, technical, and physical safeguards to protect Client information in compliance with the Gramm-Leach-Billey Act (GLBA) and the FTC Safeguards Rule. All data transmissions are conducted exclusively via secure, encrypted channels.

ii. Client Remote Security Obligations:

The Client is responsible for the security of their own devices, email access, login credentials, and digital signatures. The Firm is not liable for breaches or identity theft on the Client's local systems or through unsecure transmission methods.

III. FEE DEDUCTION AUTHORIZATION & PAYMENT TERMS

The Client authorizes all invoiced tax preparation and filing fees to be deducted directly from their federal and/or state tax refund via a third-party partner bank. Applicable bank processing and administrative fees may apply and will be disclosed prior to filing.

The remaining balance of the refund will be issued to the Client after fee deduction.

If the IRS or state reduces delays, or intercepts the expected refund, or if for any reason the Firm does not receive full payment from the refund, the Client remains personally and immediately responsible for paying the outstanding balance directly to the Firm.

i. Integrated Third-Party Refund Transfer (Pay-by-Refund)

Client hereby authorizes and directs the Firm's designated partner banking institution to deduct the full amount of tax preparation fees, bank administrative processing fees, and associated electronic filing charges directly from Client's federal and/or state tax refund check or direct deposit. The remaining balance of the refund will be issued to the Client by the bank. Client acknowledges that if the IRS or state intercepts, reduces, or offsets the expected refund, Client remains personally and directly liable to the Firm for immediate out-of-pocket payment of the remaining fee balance.

IV. GOVERNING LAW & SEVERABLITY

This agreement is governed by the laws of the jurisdiction where the Firm's primary business is registered. If any provision is deemed invalid or unenforceable, the remaining provisions will remain in full effect.

CLIENT ACKNOWLEDGMENT & SIGNATURE

By signing below, you acknowledge that you have read, understood, and agree to the terms and conditions of this Agreement, including the liability limits and fees deduction authorization set forth above.

Primary Taxpayer Signature:

SIGN HERE

____

Primary Taxpayer Name:

PRINT NAME HERE

____

Secondary Taxpayer Signature (if applicable):

SIGN HERE

____

Secondary Taxpayer Name:

PRINT NAME HERE

____

Signature Date:

MM/DD/YYYY

____

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DISCLAIMERS & LEGAL DISCLOSURES

No Guarantee of Refund Amount or Timing

The Firm cannot guarantee any specific refund or approval by the IRS or state authorities. Any adjustments, delays, or audits are outside the Firm's control and do not relieve the Client's obligation to pay all fees in full.

Third-Party Fees

Clients opting for refund-based payment acknowledge that additional bank, administrative, and technology fees may apply. The Firm is not responsible for delays caused by third-party processing or IRS funding timelines.

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