Terms and Conditions — Simple Tax & Loans, LLC

2027 STL Tax Preparer Training Course

1. Parties / Acceptance

By registering for the 2027 STL Tax Preparer Training Course ("Course"), you ("Participant") agree to these Terms and Conditions ("Terms"). These Terms form a binding agreement between you and Simple Tax & Loans, LLC ("Company"). If you do not agree, do not register.

2) Course Description and Schedule

The Course may include group sessions, 1-on-1 coaching, and/or asynchronous self-paced learning ("Training Components"). The Company may adjust the schedule, session dates/times, and/or course materials as needed. Where applicable, group training will include scheduled live sessions (e.g., Thursdays) and required participation during those times.

3) Eligibility

Participants must meet any registration requirements provided at signup (including internet access requirements and attendance expectations for live components). By registering, you confirm you can participate as required for your selected Training Component.

4) Use of Materials and Intellectual Property

All Course materials, templates, presentations, checklists, scripts, and related content are Company property or used under license. You agree not to copy, distribute, sell, publish, or create derivative works from Course materials. You may use materials solely for internal learning and preparing tax returns in alignment with Company policies and training guidance.

Simple Tax and Loans
Dallas, Texas 75241
info@simpletaxandloans.com

5) Confidentiality and Professional Conduct

You agree to treat all Company information and client-related information learned during Training as confidential. You will not disclose confidential information to any third party. During Training, you must conduct yourself professionally, including respectful communication in group sessions and appropriate behavior in all Company systems and calls.

6) Client Data and Responsible Handling

If you are provided with sample data, training scenarios, or case examples, you agree to use that information only for training purposes. You will not attempt to access, request, or handle real client records unless and until you are authorized by the Company and trained to do so. You must follow all Company rules for handling records and communications.

7) Accuracy and Compliance Expectations

Tax preparation requires accuracy and compliance. The Course is training and does not replace your responsibility to ensure any work you perform meets applicable laws, regulations, and Company quality standards. Any review process, sign-offs, or escalation steps must be followed exactly as instructed.

8) Attendance, Participation, and Completion

For live sessions, attendance is required unless otherwise approved by the Company. For asynchronous components, you agree to complete assigned modules and any checkpoints/quizzes by the required deadlines (if applicable). The Company may remove or pause access for participants who do not meet the defined participation expectations.

Simple Tax and Loans
Dallas, Texas 75241
info@simpletaxandloans.com

9) Payments and Refunds (If Applicable)

If the Company charges a registration fee, payment terms will be provided at signup. Unless otherwise stated in writing by the Company, fees are non-refundable. The Company may refund only in limited circumstances and at its sole discretion.

10) No Guarantee of Employment or Assignment

Completion of the Course does not guarantee employment, compensation, or continued placement with the Company. Any job offers, role assignments, and compensation are determined separately by the Company and are not guaranteed by participation in the Course.

11) Limitation of Liability

To the maximum extent permitted by law, the Company is not liable for indirect, incidental, special, consequential, or punitive damages arising from or related to participation in the Course. The Company's total liability for any claim will not exceed the amount you paid to the Company for the Course (if any).

12) Termination

The Company may terminate your participation in the Course at any time for reasons including: violation of these Terms, unprofessional conduct, confidentiality breaches, misuse of materials, failure to meet attendance/participation requirements, or any conduct the Company determines to be harmful or inappropriate.

13) Governing Law

These Terms are governed by the laws of the state where the Company is based/operates (as determined by the Company). Any disputes will be handled in the appropriate state or federal court for that jurisdiction.

Simple Tax and Loans
Dallas, Texas 75241
info@simpletaxandloans.com

14) Changes to Terms

The Company may update these Terms from time to time. If changes are made after you register, the Company will notify you where reasonably possible. Continued participation constitutes acceptance of the updated Terms.

15) Contact

For questions about these Terms, contact:

Simple Tax & Loans, LLC
info@simpletaxandloans.com