

Just Ask Dorcas for Tax Pros

Terms & Conditions

By enrolling in Just Ask Dorcas for Tax Pros, you agree to the following terms and conditions.

1. Membership Scope

Just Ask Dorcas for Tax Pros provides tax professionals with access to general tax guidance, professional support, and advisory conversations when questions arise in their work.

The membership is designed to help members work through tax questions, scenarios, concepts, and situations that may come up while preparing returns or working with clients.

The membership does not include tax preparation, tax return filing, bookkeeping, implementation services, representation before taxing authorities, or completion of work on behalf of the member or their clients.

2. Monthly Support

Each membership month includes:

- Up to 10 support requests by text or email
- Up to 2 hours of advisory support by Zoom or phone
- Advisory time must be scheduled in advance and is subject to availability
- Advisory time may be scheduled in 30-minute or 60-minute increments

The included advisory time may be used for:

- Tax return questions and walkthroughs
- Scenario-based guidance and “what should I do?” situations
- Troubleshooting tax-related issues
- High-level review of specific items or concerns
- General tax strategy direction
- Working through tax concepts or treatment

The 2 hours are a monthly maximum and are not guaranteed appointment slots. Members are responsible for scheduling their advisory time during the applicable billing cycle. Appointment availability is first come, first served.

3. Support Requests

A support request is generally considered one question, issue, or related scenario.

Multiple unrelated questions submitted together may be treated as separate support requests.

Text and email support is intended for questions that can reasonably be addressed through brief professional guidance.

Questions requiring lengthy explanations, screen sharing, extensive research, detailed calculations, multiple-document review, or more in-depth analysis may be redirected to a scheduled advisory session or require a separate paid engagement.

4. Service Limitations

Just Ask Dorcas for Tax Pros provides guidance and support. It is not a done-for-you service.

The membership does not include:

- Preparation or completion of tax returns
- Filing tax returns or other tax forms
- Comprehensive review of complete tax returns
- Bookkeeping or accounting services
- Preparing calculations, schedules, or workpapers on behalf of the member
- Tax research projects requiring extensive analysis
- Client meetings or communication with the member's clients
- Representation before the IRS or other taxing authorities
- Implementation of recommendations

If a question or situation requires work beyond the normal scope of the membership, a separate service or engagement may be recommended.

5. Non-Rollover Policy

Membership benefits are available during the applicable monthly billing cycle only.

Unused support requests and unused advisory time do not roll over or accumulate into future months.

Members are responsible for scheduling their advisory time before the end of their applicable billing cycle.

6. Additional Support

Support exceeding the monthly membership limits may be available at a rate of \$150 per hour with prior approval.

Additional support is subject to availability and is not guaranteed.

If the requested support falls outside the scope of Just Ask Dorcas for Tax Pros, separate pricing and engagement terms may apply.

7. Response Time

Text and email support requests will generally receive a response within 24–48 business hours.

Response times do not include weekends, holidays, or periods when Fulton Brown & Co. has communicated limited availability.

Membership does not include emergency, immediate, or on-demand support.

8. Scheduling, Cancellations & No-Shows

All Zoom and phone advisory sessions must be scheduled in advance using the provided booking link.

Appointments are available on a first-come, first-served basis.

Members should cancel or reschedule at least 24 hours before their scheduled appointment.

Appointments canceled with less than 24 hours' notice or missed without notice may be counted against the member's available advisory time for that month.

9. Client Information & Confidentiality

Members are responsible for protecting their clients' confidential information and complying with applicable privacy, professional, and data-security requirements.

Members should not send unnecessary personally identifiable information through text or email.

When discussing client situations, members should provide only the information reasonably necessary to address the question.

Membership access is for the enrolled member only and may not be shared with employees, contractors, business partners, other tax professionals, or any other individual without prior approval.

10. Professional Responsibility

Guidance provided through Just Ask Dorcas for Tax Pros is based on the facts and information provided by the member.

Members remain responsible for performing their own due diligence, verifying information, applying appropriate professional judgment, and determining the appropriate tax treatment for their clients.

Tax laws, regulations, guidance, and individual circumstances may change or require additional analysis.

Fulton Brown & Co. is not responsible for errors, penalties, additional taxes, or other outcomes resulting from incomplete, inaccurate, or omitted information provided by the member or from a member's independent application of guidance provided through the membership.

11. Payment & Billing

Membership is billed monthly at \$75 per month.

Membership automatically renews each billing cycle unless canceled before the next billing date.

Payments are non-refundable once the billing cycle begins.

Members may cancel at any time before their next billing date to prevent the next recurring charge.

Cancellation does not provide a refund or prorated refund for the current billing cycle.

12. Membership Changes

Fulton Brown & Co. reserves the right to modify membership pricing, benefits, support limits, availability, or these terms and conditions.

Members will be notified of material changes before those changes apply to a future billing cycle.

Continued membership after the effective date of updated terms constitutes acceptance of the updated terms.

13. Termination

Fulton Brown & Co. reserves the right to suspend or terminate membership access for:

- Nonpayment
- Misuse or abuse of membership benefits
- Abusive, threatening, or inappropriate conduct
- Sharing membership access with others
- Repeated violation of membership boundaries
- Repeated violation of these Terms & Conditions
- Use of the membership for purposes outside its intended scope

Termination resulting from a violation of these terms may result in immediate loss of membership access without refund.

14. Acceptance of Terms

By purchasing, enrolling in, or continuing a Just Ask Dorcas for Tax Pros membership, you acknowledge that you have read, understood, and agreed to these Terms & Conditions.