

Terms & Conditions

RHPersonalBookkeepingServicesLLC

Last updated: [May 27, 2025]

1. Scope of Services

RHPersonalBookkeepingServicesLLC offers personal finance bookkeeping services including, but not limited to:

- Initial financial setup
- Monthly transaction categorization
- Budget planning
- Monthly and year-end reporting
- Retainer-based support

These services are bookkeeping-only and do not constitute CPA, legal, investment, or tax advisory services unless otherwise specified in writing.

2. Payment Terms

All services require full payment upfront via Square, prior to work beginning. Retainer fees secure your spot and cover initial setup time, system building, and first-month reporting. Ongoing services (if applicable) are billed separately after retainer setup is completed.

3. Refund Policy

All retainer payments are non-refundable. By submitting payment, you acknowledge that work begins immediately, and time and resources are allocated to your account setup and financial system design.

4. Client Responsibilities

Clients agree to:

- Provide accurate and complete financial information in a timely manner
- Respond to communication within a reasonable time frame
- Use secure document-sharing tools when submitting sensitive financial data

Failure to cooperate or provide necessary materials may delay services.

5. Service Limitations

RHPersonalBookkeepingServicesLLC does not file taxes or offer financial advisory services unless separately agreed upon in writing. All services are for bookkeeping and organizational purposes only. Clients are responsible for consulting a licensed tax preparer or CPA for filing-related questions or investment decisions.

6. Confidentiality

All client data is kept confidential and secured. Your financial information will never be shared, sold, or disclosed without your written consent, unless required by law.

7. Termination of Services

RHPersonalBookkeepingServicesLLC reserves the right to terminate services if a client is uncooperative, abusive, or fails to provide information within a reasonable time frame. No refunds will be given in these situations.

8. Agreement to Terms

By submitting payment for services, the client agrees to these terms in full.