

REFUND AND CANCELLATION POLICY – STEPHANIE MOUNTS, EA

Last Updated: October 12, 2025

PROFESSIONAL SERVICES

Tax Preparation and Planning Services

- Refunds are available if services have not been substantially performed
- Once tax returns are filed or substantial work is completed, fees are non-refundable
- Cancellation of services must be in writing

IRS Representation

- Retainer fees are applied to services as rendered
- Unused retainer amounts will be refunded upon termination of representation
- Minimum engagement fees are non-refundable

Financial Coaching Services

- Session fees are non-refundable once the session has occurred
- Sessions may be rescheduled with 24-hours notice
- Package purchases may be refunded on a pro-rata basis for unused sessions

DIGITAL PRODUCTS AND ONLINE COURSES

Digital Downloads

- Due to the nature of digital products, all sales are final once the product has been downloaded
- We offer a 7-day money-back guarantee if the product has not been downloaded

Online Courses

- Full refund available within 14 days of purchase if less than 20% of course content has been accessed
- No refunds after 14 days or if more than 20% of content has been accessed
- Technical issues preventing access will be resolved or refunded

Subscription Services

- Cancellation of subscriptions takes effect at the end of the current billing period

- No partial month refunds are provided
- Annual subscriptions may be refunded on a pro-rata basis within the first 30 days

REFUND PROCESS

To request a refund:

1. Email stephaniemounts@protonmail.com with your order information
2. Include the reason for your refund request
3. Allow 5-7 business days for review
4. Approved refunds will be processed within 10-14 business days

DISPUTES

We encourage you to contact us first to resolve any issues. If we cannot reach a satisfactory resolution, disputes may be subject to mediation or arbitration as outlined in our Terms and Conditions.

CONTACT INFORMATION

For refund and cancellation requests:

Stephanie Mounts, EA
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