

Membership Plan Enrollment Form

Complete this form to enroll in a monthly tax support membership plan. To protect your information, do not email card or bank details. Use the secure portal or complete payment authorization with the office.

Client information

Full name	
Address	
Phone number	
Email address	
Business name, if applicable	

Selected plan

☐ Essential Tax Support Plan - \$40/month
☐ Self-Employed Tax Support Plan - \$100/month
☐ Bookkeeping Essentials Plan - starting at \$200/month
☐ Bookkeeping + Self-Employed Tax Support Plan - \$300/month
☐ Other: _____

Preferred monthly payment method

☐ Credit or debit card - complete below or through secure payment link	☐ ACH bank draft - complete below or through secure authorization
☐ Zelle on due date	☐ Cash App on due date

Dates and authorization

Preferred monthly due date	
Plan start date	
Client signature	
Date signed	

Credit or debit card

For security, do not include CVV. The office may request final authorization through a secure link.

Name on card	
Card number	
Expiration date	
Billing ZIP code	

ACH / bank account

Bank name	
Routing number	
Account number	
Account type: ☐ Checking ☐ Savings	
Name on account	

Important terms

• I authorize MJ Accounting & Professional Services Corp to process monthly payments using the selected method and due date.
• Membership can be cancelled at any time by submitting a cancellation form. Services remain active until the last day of the last paid month.
• When cancelling, the total credit available on the account may be used only toward the following/next tax season tax return.
• If support is needed with a prior-year tax return not prepared by MJ Accounting & Professional Services Corp, the full preparation cost must be paid even with active membership.
• Zelle or Cash App payments must be submitted by the monthly due date indicated.

