



“We Don’t Just Do Taxes...WE KNOW TAXES”

2025 ADVANCED INCOME TAX COURSE AGREEMENT

01. I understand that this agreement is solely between me and TCL Financial & Tax Services and outlines the terms and conditions of the 2025 Advanced Income Tax Course being offered by the company.
02. I understand that I am subject to follow all rules of the Privacy Disclosures set forth by TCL Financial & Tax Services. I further understand that I will not sell or share any current employee, potential employee, student, current client, or potential client’s personal information to anyone not authorized to know such information.
03. I understand that I am voluntarily enrolling in the 2025 Advanced Income Tax Course being offered by TCL Financial & Tax Services, which will begin Thursday, May 29, 2025 and will end on Thursday, September 25, 2025.
04. I understand that there is no cost for the 2025 Advanced Income Tax Course. I further understand that only current Team Members (Tax Advisors, Veteran Tax Advisors, Master Tax Advisors, and Franchisees) at TCL Financial & Tax Services can enroll in and attend the course.
05. I understand that my attendance is voluntary for the 2025 Advanced Income Tax Course being offered by TCL Financial & Tax Services from Thursday, May 29, 2025 through Thursday, September 25, 2025.
06. I understand that all class meetings will begin promptly at 6:00 p.m. I further understand that there will be a 15 minute grace period for each student to gain entrance into the classroom. I further understand that at 6:15 p.m. of each class period, doors will lock immediately and entrance will only be allowed during break periods or unless prior approval by the instructor is granted.
07. I understand that I am responsible for the signing in of myself only on the Sign-In Sheet when I arrive to each class period. I further understand that I should never do such act for any other individual.
08. I understand that while in attendance of the 2025 Advanced Income Tax Course that I am not to audio and/or video record any class sessions unless prior approval by the instructor is granted.
09. I understand that while I am in attendance of the 2025 Advanced Income Tax Course that I am to keep all cellular phones, mobile devices, or any other form of communication or electronic device on a silent tone (not vibrate).
10. I understand that in the event I am absent from any class period that I am responsible for retrieving any missed information and material from the instructor prior to the next class meeting date.

_____ **TEAM MEMBER’S INITIALS**

11. I understand that I am enrolling in the 2025 Advanced Income Tax Course being offered by TCL Financial & Tax Services for the sole purpose of gaining more knowledge of income tax laws. I further understand that I will not be contracted, employed, self-employed, or conduct any duties for any other individual or business that offers the same or similar services that are rendered by TCL Financial & Tax Services. I further understand that if I am dismissed as a student or as an employee voluntarily or involuntarily that I will not be contracted, employed, self-employed, or conduct any duties for any other individual or business that offers the same or similar services that are rendered by TCL Financial & Tax Services within two years from my separation date from the class or company.
12. I understand that the only exception to the 2025 Advanced Income Course Agreement Number 11 above is to pay an Agreement Buyout Fee of \$5,000 to TCL Financial & Tax Services. I further understand that paying the Agreement Buyout Fee is the only way, if I am dismissed as a student or as an employee, voluntarily or involuntarily, that I can be contracted, employed, self-employed, or conduct any duties for any other individual or business that offers the same or similar services that are rendered by TCL Financial & Tax Services within two years from my separation date from the class or company. I further understand that if the Agreement Buyout Fee is not paid by me voluntarily that I will be liable for all collection cost, court cost, and legal fees subjected to TCL Financial & Tax Services.
13. I understand that while in attendance of the 2025 Advanced Income Tax Course that I am to conduct myself in a courteous and professional manner towards the instructor and other students in the class.
14. I understand that any violations of any of the above mentioned articles in this agreement will result in my full dismissal from the class.

I AGREE AND UNDERSTAND ALL OF THE ABOVE TERMS AND CONDITIONS OF THE 2025 ADVANCED INCOME TAX COURSE AGREEMENT BEING PRESENTED BY TCL FINANCIAL & TAX SERVICES

TODAY'S DATE

TEAM MEMBER'S PRINTED NAME

TEAM MEMBER'S SIGNATURE

TCL AUTHORIZED REPRESENTATIVE'S SIGNATURE

UPDATED: 3/30/2025