

Terms of Service

Synergy Tax & Accounting Services LLC / Synergy Financial Edge

Effective Date: February 26, 2026

1. Acceptance of Terms

By accessing our website at www.synergyfe.com, scheduling an appointment, or engaging our services, you agree to be bound by these Terms of Service. If you do not agree to these terms, please do not use our website or services. These Terms of Service apply to all visitors, clients, and others who access or use our services.

2. Services Provided

Synergy Tax & Accounting Services LLC, doing business as Synergy Financial Edge, provides professional accounting, tax planning, CFO advisory, and related financial services to small and medium-sized businesses. Our services include but are not limited to:

- Tax planning and preparation
- CFO advisory and financial consulting
- Cash flow management and profit optimization
- Bookkeeping and financial reporting
- Business financial assessments

All services are provided by or under the supervision of a licensed Certified Public Accountant (CPA) in the state of Arizona. Services are subject to a separate engagement agreement or service contract which will govern the specific terms of each client engagement.

3. Appointments and Scheduling

By scheduling an appointment through our booking system, you agree to provide accurate contact information and to attend or cancel your appointment with reasonable notice. We reserve the right to reschedule or cancel appointments as needed. Appointment scheduling does not constitute the establishment of a client relationship or engagement of services.

4. SMS Communications

By providing your phone number and selecting the consent checkbox on our booking form, you agree to receive transactional SMS messages from Synergy Tax & Accounting Services LLC,

including appointment reminders, service notifications, and follow-up communications.

Message frequency may vary. Message and data rates may apply. Reply STOP at any time to opt out. Reply HELP for assistance.

SMS consent is not a condition of purchasing any goods or services. Your phone number and SMS consent will never be shared with third parties for their own marketing purposes.

5. Professional Relationship

Use of our website or scheduling a consultation does not establish a CPA-client relationship. A professional relationship is only established upon execution of a signed engagement letter or service agreement. Information shared prior to establishing a formal engagement is not protected by accountant-client privilege.

6. Confidentiality

Once a formal client relationship is established, we are committed to maintaining the confidentiality of all client information in accordance with applicable professional standards, Arizona state law, and federal regulations governing tax professionals. We will not disclose your confidential information to third parties without your consent, except as required by law.

7. Website Content and Disclaimers

The content on our website is provided for general informational purposes only and does not constitute professional accounting, tax, legal, or financial advice. You should not act on any information on this website without seeking professional advice specific to your situation.

We make reasonable efforts to keep the information on our website current and accurate, but we make no warranties or representations as to the accuracy, completeness, or timeliness of any content on this site.

8. Intellectual Property

All content on this website, including text, graphics, logos, and images, is the property of Synergy Tax & Accounting Services LLC and is protected by applicable intellectual property laws. You may not reproduce, distribute, or use any content from this website without our prior written consent.

9. Limitation of Liability

To the fullest extent permitted by law, Synergy Tax & Accounting Services LLC shall not be liable for any indirect, incidental, special, consequential, or punitive damages arising from your use of our website or services. Our total liability for any claim arising from our services shall not exceed the amount paid by you for the specific service giving rise to the claim.

10. Third-Party Links

Our website may contain links to third-party websites. We are not responsible for the content, privacy practices, or terms of service of those sites. Links do not constitute an endorsement of those websites or their content.

11. Automated and AI-Assisted Tools

We may use automated systems or AI-assisted tools to support scheduling, communications, and internal business operations. Any professional advice or recommendations provided to you will always involve human review by a licensed professional. Automated communications such as appointment reminders do not constitute professional advice.

12. Governing Law

These Terms of Service shall be governed by and construed in accordance with the laws of the State of Arizona, without regard to its conflict of law provisions. Any disputes arising from these terms or our services shall be resolved in the appropriate courts of Maricopa County, Arizona.

13. Changes to These Terms

We reserve the right to update these Terms of Service at any time. We will notify you of significant changes by updating the effective date at the top of this page. Continued use of our website or services after changes constitutes acceptance of the updated terms.

14. Contact Us

If you have any questions about these Terms of Service, please contact us:

Synergy Tax & Accounting Services LLC / Synergy Financial Edge

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