



CLIENT & BUSINESS POLICY DOCUMENT PACKET

True North Task Management

Fort Worth, Texas & surrounding DFW communities

Helping You Navigate Life's To-Do List

Prepared for business use - attorney review recommended before adoption.

This packet is a starting template for True North Task Management. It is not legal advice and does not create an attorney-client relationship. Texas-specific requirements, insurance coverage, transportation regulations, privacy obligations, and notary rules should be reviewed by qualified professionals before these documents are used with clients.

1. Client Service Agreement

Parties and Purpose

This Client Service Agreement ("Agreement") is between True North Task Management ("True North," "we," "us," or "our") and the client identified below ("Client," "you," or "your"). It describes the general terms under which True North may provide concierge, task-management, senior assistance, non-emergency transportation, errand, personal assistance, meal-preparation, mobile notary, and related services.

Services

Services are provided only as specifically agreed at the time of booking. Services may include transportation, appointment accompaniment, errands, grocery assistance, senior check-ins, personal task assistance, meal preparation, mobile notary services, and other mutually agreed services.

True North may decline a request when the service is outside our capabilities, creates an unsafe condition, requires medical care, involves an emergency, or otherwise cannot reasonably be provided within our policies or applicable law.

Client Responsibilities

Client agrees to provide accurate information, including addresses, appointment times, contact information, mobility considerations, and special instructions relevant to the requested service.

Client agrees to treat True North personnel respectfully and to provide a reasonably safe environment. Client is responsible for disclosing information necessary to safely perform the requested service.

Fees and Expenses

Fees are based on the applicable service rate, package, or written quote. Additional charges may apply for mileage, tolls, parking, waiting time, after-hours service, same-day requests, extended travel, or other agreed expenses.

Unless otherwise agreed in writing, payment is due at or before completion of service. A deposit or payment in advance may be required.

Service Limitations

True North is a concierge and non-emergency assistance business. Unless separately and expressly agreed, True North does not provide medical diagnosis, treatment, nursing care, emergency response, ambulance services, lifting or transferring of clients, medication administration, or other clinical services.

True North does not guarantee appointment outcomes, traffic conditions, flight schedules, or third-party services.

Release and Assumption of Risk

To the extent permitted by applicable law, Client acknowledges that ordinary risks may arise from transportation, travel, entering or exiting a vehicle, walking in public places, weather, traffic, and other activities. Client agrees to follow reasonable safety instructions and understands that True North is not responsible for risks outside its reasonable control.

Nothing in this Agreement is intended to waive rights that cannot legally be waived under applicable law.

Term and Termination

Either party may end the service relationship at any time. Outstanding fees and agreed cancellation charges remain due. True North may immediately terminate a service if safety, unlawful conduct, abusive behavior, or other serious concerns arise.

Governing Law

This Agreement is intended to be governed by the laws applicable in the State of Texas, without limiting any rights or protections that cannot lawfully be waived.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

2. Non-Emergency Transportation Agreement

Transportation Services

True North provides private, non-emergency transportation and related concierge assistance. True North is not an ambulance service and does not provide emergency medical transportation.

Client Fitness for Transportation

Client confirms that they can safely enter and exit the vehicle with the level of assistance that True North has agreed to provide. Unless expressly agreed and legally permitted, True North does not provide medical lifting, transfers, or clinical care.

Clients using mobility devices must notify True North in advance. Transportation of mobility devices is subject to vehicle capacity and safe-storage limitations.

Pickup and Drop-Off

Client agrees to provide accurate pickup and destination information and to be ready at the scheduled pickup time. Delays caused by Client may result in additional waiting charges.

True North may refuse or discontinue transportation if the vehicle cannot be operated safely, if the Client is impaired in a manner that creates a safety risk, or if conditions present an unreasonable risk to the driver or passengers.

Waiting Time and Additional Expenses

Waiting time, tolls, parking, extended travel, and other agreed expenses may be billed separately. Airport and event transportation may have special terms communicated at booking.

Emergency Situations

If an emergency occurs during transportation, True North may contact emergency services and the Client's designated emergency contact. True North does not provide emergency medical treatment.

Weather and Road Conditions

Transportation may be delayed, rescheduled, or canceled because of severe weather, unsafe road conditions, traffic, construction, airport disruptions, or other circumstances beyond reasonable control.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

3. Cancellation & Rescheduling Policy

Standard Policy

Cancellation or rescheduling requests made at least 24 hours before the scheduled service generally will not incur a cancellation fee.

Cancellations made less than 24 hours before service may be charged 50% of the reserved service amount.

Same-day cancellations and no-shows may be charged up to 100% of the scheduled service amount.

Special Reservations

Airport transportation, special events, long-distance transportation, recurring reservations, and services requiring advance purchases may have stricter cancellation terms disclosed at booking.

Exceptions

True North may waive or reduce a cancellation fee when circumstances warrant, including certain emergencies or situations outside the Client's reasonable control.

Rescheduling

Rescheduling is subject to availability. A new deposit may be required when a reservation is changed repeatedly or when the original reservation involved a non-refundable expense.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

4. Payment Policy

Payment Due

Payment is due at the time of service unless a different arrangement has been approved in writing. A valid payment method may be required to reserve certain appointments.

Deposits and Prepayment

True North may require deposits or full prepayment for transportation, special events, long-distance trips, new clients, or other reservations that require the business to reserve significant time or incur advance expenses.

Additional Charges

Client is responsible for agreed service fees and applicable mileage, tolls, parking, waiting time, after-hours charges, same-day charges, and other disclosed expenses.

Late or Unpaid Balances

Unpaid balances may result in suspension of future services until the account is brought current. True North may use lawful collection methods for amounts properly due.

Refunds

Refunds, when applicable, will be handled according to the service booked, payment processor rules, and the cancellation terms communicated at booking.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

5. Privacy Policy

Information We Collect

True North may collect information necessary to provide services, communicate with clients, schedule appointments, process payments, maintain records, and respond to inquiries. This may include names, contact information, addresses, appointment details, emergency contacts, authorized family contacts, and payment-related information.

Sensitive Information

Clients should provide only information reasonably necessary for the requested service. True North does not request unnecessary medical information. Information about mobility or assistance needs may be collected when necessary for safe service delivery.

How We Use Information

We may use information to schedule and provide services, communicate with clients and authorized contacts, process payments, maintain business records, comply with legal obligations, improve services, and protect safety.

Sharing Information

True North does not sell client information. Information may be shared with service providers needed to operate the business, payment processors, scheduling platforms, legal or professional advisers, emergency responders, or other parties when authorized by the Client or required/permitted by law.

Family Communications

True North will communicate with family members or other support persons only when the Client has authorized such communication, when legally permitted, or when necessary to address an emergency or safety concern.

Data Security

True North uses reasonable administrative, technical, and physical safeguards appropriate to the nature of information handled. No method of electronic storage or transmission is guaranteed to be completely secure.

Retention and Requests

Records may be retained as reasonably necessary for business, legal, tax, insurance, and operational purposes. Clients may contact True North to ask questions about their information or request correction of inaccurate information, subject to applicable law.

Policy Changes

This policy may be updated as the business, technology, or legal requirements change. The current version should be maintained on the True North website.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

6. Website Terms of Use

Acceptance

By using the True North Task Management website, you agree to these Terms of Use. If you do not agree, please do not use the website.

Informational Content

Website content is provided for general informational purposes and does not constitute medical, legal, financial, or professional advice. Service availability, pricing, and descriptions may change.

No Emergency Services

The website and True North services are not intended for emergencies. Call 911 or your local emergency service for immediate medical or safety emergencies.

Bookings and Quotes

Submitting an online booking or request does not necessarily guarantee service until True North confirms the reservation. Prices and availability are subject to the terms provided at booking.

Intellectual Property

Unless otherwise noted, website text, logos, graphics, branding, and other content are owned by or licensed to True North and may not be copied, modified, or commercially reused without permission.

Third-Party Links

The website may contain links to third-party websites. True North is not responsible for third-party content, policies, or services.

Limitation

To the extent permitted by law, True North is not responsible for losses arising from website interruptions, third-party platforms, inaccurate information supplied by users, or circumstances beyond reasonable control.

Governing Law

These Terms are intended to be governed by applicable Texas law, subject to mandatory legal protections.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

7. Emergency & Medical Disclaimer

No Emergency Medical Services

True North Task Management is not an emergency medical provider, ambulance service, home health agency, or medical treatment provider unless separately stated in writing and legally authorized. True North does not diagnose, treat, or manage medical conditions.

Emergency Response

If a Client experiences a medical emergency or urgent safety concern, the appropriate emergency service should be contacted immediately. True North may call 911 or other emergency services when a situation appears to require immediate assistance.

Medication

True North does not administer medications or make medical decisions unless a separate service is expressly authorized and legally permitted. Clients remain responsible for their medications and medical care.

Appointments

Transportation to or accompaniment at a medical appointment does not create a healthcare provider relationship. True North cannot guarantee the outcome of any medical appointment or treatment.

Client Responsibility

Clients and their authorized representatives are responsible for providing accurate information about mobility and assistance needs necessary for safe service delivery.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

8. Mobile Notary Terms

Scope

True North may provide mobile notary services through a commissioned Texas notary public when available and when the requested act is permitted by Texas law.

Notarial Fees and Travel

Notarial fees are separate from travel, convenience, or other service charges. Applicable statutory notarial fees will be charged as required by Texas law. Travel or service fees, if offered, will be disclosed separately.

Identification and Personal Appearance

Signers must satisfy applicable identification and personal appearance requirements. The notary may refuse an act when legal requirements are not met.

Documents

Clients are responsible for presenting complete documents and understanding the documents they sign. A notary does not provide legal advice, draft legal documents, select forms, or explain the legal effect of a document.

Witnesses

Clients are responsible for arranging required witnesses unless True North has separately agreed to assist with witness coordination. Any witness must meet applicable legal requirements.

Refusal or Rescheduling

A notary may refuse or reschedule a notarization when required by law, when identification is insufficient, when the signer appears unwilling or unable to understand the act, or when other lawful grounds exist.

Travel Conditions

Mobile notary appointments may be affected by traffic, weather, safety, and access conditions. Additional travel charges may apply when disclosed in advance.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

9. Vehicle & Transportation Safety Policy

Driver Safety

Drivers must comply with applicable traffic laws and operate vehicles safely. Seat belts are required for all occupants when required by law.

Vehicle Condition

Vehicles used for client transportation should be maintained in safe operating condition and inspected as appropriate. True North may cancel or delay service if a vehicle or road condition is unsafe.

Passenger Safety

Clients must remain seated and use seat belts while the vehicle is moving. Clients should not distract the driver or engage in behavior that creates a safety risk.

Mobility Devices

Mobility devices must be disclosed in advance. The driver may determine whether a device can be safely transported based on vehicle capacity and storage limitations.

Child Transportation

Child transportation is available only when specifically agreed in advance and when appropriate child-restraint requirements can be met. Clients or guardians are responsible for providing an appropriate car seat or booster unless True North has expressly agreed otherwise.

Prohibited Conduct

Smoking, vaping, illegal drug use, weapons, and hazardous materials are prohibited in the vehicle. Alcohol may not be consumed in the vehicle.

Unsafe Conditions

True North may refuse or discontinue service when a passenger's conduct, condition, or circumstances create an unreasonable safety risk.

Incident Reporting

Any accident, injury, safety concern, or significant incident should be reported to True North as soon as reasonably possible. Emergency services will be contacted when appropriate.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

10. Authorization to Communicate with Family Members / Support Persons

Important: Use this form for general service communications. It is not a HIPAA authorization form. If True North will handle protected health information in a regulated healthcare context, obtain specialized legal guidance and use the appropriate authorization.

Authorization

I authorize True North Task Management to communicate with the person(s) listed below regarding scheduling, transportation status, service completion, and general non-medical updates related to services I have requested.

Authorized Contact 1

Name: _____

Relationship: _____

Phone: _____

Email: _____

Authorized Contact 2

Name: _____

Relationship: _____

Phone: _____

Email: _____

Scope of Authorization

I understand that this authorization does not automatically authorize True North to disclose confidential medical records or make healthcare decisions on my behalf. Any disclosure of protected or legally restricted information will be handled only as permitted by applicable law and any separate authorization that may be required.

Emergency Contact

I authorize True North to contact my designated emergency contact when reasonably necessary to address an emergency or immediate safety concern, to the extent permitted by law.

Revocation

I may revoke this authorization in writing at any time, except to the extent True North has already relied upon it or is otherwise permitted or required by law to communicate.

Client/Authorized Representative Name: _____

Signature: _____ Date: _____

True North Representative: _____ Date: _____

Client Document Packet — Final Acknowledgment

I acknowledge that I have received and reviewed the policies and agreements applicable to the services I have requested from True North Task Management. I understand that individual services may have additional terms communicated at booking.

Client/Authorized Representative Name: _____

Signature: _____ **Date:** _____

True North Representative: _____ **Date:** _____

Business Contact Information

True North Task Management
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Website: TrueNorthTaskManagement.com

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