Deposit policy and wording kit

Fill in your policy once. Then copy the lines you need.

Please read

This is a template, not legal advice. Deposit rules differ by place. Check your local rules.

How to use this kit

- Part 1 is a policy with blanks. Fill in each section in your own words and numbers.
- Part 2 has lines to copy for your website, your quote, your booking form and your confirmation email, plus replies for pushback.
- Swap everything in [square brackets] for your own details.
- Use the same amount, dates and notice period everywhere you mention the deposit.

Part 1. Your deposit policy

1. How much

A flat amount or a share of the price. Tie it to what you lose if the client cancels: the time you held and any costs you have paid.

To book, we ask for a deposit of [amount] / [share] of the price of the job.

Your version

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2. When it is due

State it before the client says yes.

The deposit is due [when you book / within ___ days of accepting the quote]. We hold your date once you pay the deposit.

Your version

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3. What it covers

Say what the money is for. Clients accept a deposit more easily when they know why.

The deposit holds your date and covers [the time we set aside / materials we order / other]. It comes off your final price.

Your version

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4. If plans change

Cover moving a booking, cancelling and missing the appointment. Pick words you can follow every time.

You can move your booking [number] time(s) if you tell us at least [notice period] before. If you cancel, the deposit is [returned / kept / partly returned: say how much]. If you miss the appointment, [what happens].

Your version

5. If we cancel

Say what you will do if you are the one who cancels.

If we have to cancel, we will [offer a new date / return the deposit in full / other].

Your version

6. How to pay

One clear way to pay beats three vague ones.

Pay your deposit [online in the booking form / by bank transfer / other]. We confirm your booking by email once it arrives.

Your version

7. If a deposit is returned

Say how and when, so nobody has to ask.

If we return a deposit, we send it back the way you paid within [number] days.

Your version

Your policy in one paragraph

Put the seven sections together. Keep it short enough that a client reads it.

Check before you publish

- Read your policy against the rules where you work, and ask a local lawyer to check your wording.
- Check the amount, the dates and the notice period match on your website, quote, form and emails.
- Read it out loud. If a sentence is hard to say, shorten it.

One example of a local rule

In California, the Contractors State License Board (CSLB) writes: "The down payment cannot be more than $1,000 or 10 percent of the contract price, whichever is less, for a home improvement job or swimming pool, excluding finance charges."

Source: CSLB, Learn About Home Improvement Contracts, https://www.cslb.ca.gov/Consumers/Hire_A_Contractor/Home_Improvement_Contracts/What_Is_A_Contract.aspx. Page checked on 27 October 2026.

This is one example from one place and one kind of work. Check the rules where you work.

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Part 2. Wording to copy

On your website or price list

- To book, we ask for a deposit of [amount]. It holds your date and comes off your final price.
- The deposit is due [when you book]. We hold your date once you pay it.
- You can read our full deposit and cancellation policy here: [link or page].

In your quote

- Your quote is [price]. To book your date, we ask for a deposit of [amount]. It comes off the final price.
- This quote is good until [date]. Once you pay the deposit, the date is yours.
- Questions about the deposit? Reply to this message and we will explain.

On your booking form

- Required tick box: I've read and agree to the deposit and cancellation policy.
- Policy paragraph: Our deposit policy: a deposit holds your booking and comes off your final price. You can move your booking [number] time(s) with at least [notice period] notice. Late cancellations and missed appointments [keep the deposit / other].
- Thank-you message: Thanks, you're nearly booked. We'll email you to confirm your date and time.

In your confirmation email

- Your deposit is in, and we're holding [date and time] for you. The deposit comes off your final price. To move your booking, tell us at least [notice period] before.

When a client pushes back

Stay calm and stay short. Say what the deposit does, then say what your policy says.

A client says	You can say
Why do I need a deposit?	The deposit holds your date. I turn other clients away for that time, so it keeps the date fair for both of us. It comes off your final price.
Can I pay at the end instead?	I take the deposit up front for every booking, so the policy is the same for everyone. Once you pay it, the date is yours.
Can I get the deposit back if plans change?	Here is what my policy says: [paste the sentence]. If you can move your booking with enough notice, we can pick a new date.
Can I pay a smaller deposit?	The deposit for this service is [amount]. If that is a problem, tell me what is going on and we can talk about it.

A client says	You can say
I paid, but I need to cancel.	Thanks for telling me early. Under my policy, [what happens]. If you want a new date, here are my next openings: [dates].

Three habits that help

- State the deposit before the client says yes, not after.
- Say it the same way every time, in the same words.
- Keep it short. One clear sentence beats a paragraph.

Part 3. Use it in your booking form

In HornetForms, open the Deposit booking request template. Replace its policy paragraph with your own text from Part 1 and keep the required tick box. Your clients agree to the policy before they book.

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