

**Why Subscriptions Matter:** Subscriptions and auto-renewals drive predictable revenue and forecasting—but only when the renewal experience is clear and fair. Treat auto-renewals as both a compliance requirement and a trust/UX decision to reduce disputes and regulatory risk.

**B2B vs. B2C:** B2C subscriptions are typically governed by strict consumer auto-renewal/negative-option laws (clear disclosures, affirmative consent, easy cancellation), while B2B subscriptions are more contract-driven but still need operationally supportable renewal and cancellation terms to avoid disputes.

**About This Checklist:** This is a practical, non-exhaustive guide for evaluating subscription and auto-renewal flows in both B2C and B2B. It’s for informational purposes only and isn’t legal advice.

**Card information**

1234 1234 1234 1234

MM / YY	CVC
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**Cardholder name**

Full name on card

Your plan will automatically renew at the end of each paid period (monthly or annually, as shown at checkout).

We may charge the listed subscription amount (and any applicable taxes) to your saved payment method each time your subscription renews, unless you cancel prior to the renewal date.

You can cancel at any time from your account by going to your [Account Settings](#) and following the steps to cancel; your cancellation will take effect at the end of your current paid period.

For more information, please visit our [Terms and Conditions](#).

I authorize COMPANY LLC to charge this card for future recurring subscription payments in accordance with its [Terms and Conditions](#).

Subscribe

*You're subscribing to the **Premium Plan**.*

**Billed Today: \$999**

*Billed Annually on May 1: \$999*

## CHECKOUT DISCLOSURES

A person should be able to answer these questions after **10 seconds** on your checkout screen:

- 1) **WHAT AM I PAYING FOR** (products, services)?
- 2) **WHAT AM I PAYING TODAY** (including tax and shipping)?
- 3) **WHAT AM I PAYING LATER** (at renewal, after discounts, after trial)?
- 4) **WHEN WILL I BE CHARGED NEXT** (date, frequency)?
- 5) **HOW DO I CANCEL OR MAKE CHANGES** (email, account settings)?
- 6) **WHERE CAN I FIND MORE INFORMATION?**

## CONSENT CAPTURE

Use an **unchecked** checkbox that specifically mentions the subscription terms. Do not combine this checkbox with other disclosures (like marketing).

## CLEAR & CONSPICUOUS

Do not **bury or omit important information**. Make it hard for the customer to miss.

## CONFIRMATION

- Immediately after purchase (or activation), send a confirmation/receipt that includes:
  - plan name + price + billing cadence
  - renewal timing (next charge date or “renews on X of each month”)
  - how to cancel (direct link if possible)
  - where to manage billing (account page link)
- Put “What happens next” in plain language, not just an invoice.

## RENEWAL REMINDERS

- For annual plans (and any plan where customers tend to forget):
- send a reminder “close enough to matter, not so early they forget”
- include the same information you would include in a confirmation email
- Don’t treat this as marketing—treat it as a customer-experience safeguard.

## CHANGES MID-TERM

- Before any paid change takes effect, the customer sees what is changing, when it takes effect, the new price, how to avoid it (downgrade/cancel)
- Send a change confirmation email.
- “Surprise” is what triggers complaints, refunds, and chargebacks—even when you’re technically allowed to do it.

## SUPPORT & DISPUTES

- Make “how to reach us” easy to find in the receipt and billing area.
- Set a reasonable refund/credit posture for common pain scenarios: forgot to cancel / couldn’t access account (password/SSO issues) / confusion between monthly vs annual
- Track dispute drivers (treat as a product signal): cancellation friction / unclear renewal timing / unclear plan scope / time-to-value gaps

### Re: SUBSCRIPTION CONFIRMATION / RENEWAL REMINDER

Thanks for subscribing! Your order is confirmed and your annual **Premium Plan** is now active. For more information, visit our [Terms and Conditions](#). For any questions or assistance, please contact our customer support at ###-###-#### or [hello@company.com](mailto:hello@company.com).

Payment Frequency	Payment Amount
<b>Annual</b>	<b>\$999</b>
Start Date	Renewal Date
<b>May 1, 2026</b>	<b>May 1, 2027</b>

#### How to Cancel

Sign in to [Account](#) → Billing → Cancel Subscription

#### Payment Method

Name on Card: KO Law PC

Card Type: Visa

Card Ending: \*\*\*\* \* 0000

Billing Address: 2475 Broadway, Boulder, CO 80304

## CANCELLATION

- Cancellation is findable from the account/billing area without a scavenger hunt.
- If sign-up is online, cancellation should be doable online without forcing a phone call.
- Keep the steps reasonable:
- avoid “multi-screen obstacle courses”
- if you ask for feedback, don’t hold the cancellation hostage
- Confirm cancellation (and effective date) in writing.